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Strategic Communication in Agile Organizations: Why Does Agile Face Skepticism in Organizations?

Abstract

Agile was initially developed as a methodology for software development, emphasizing iterative progress, flexibility, and collaboration. Over time, its principles have been adapted and applied to broader business operations and strategic communication processes. Like many business methodologies, Agile has its proponents who champion its benefits and skeptics who question its effectiveness. This paper aims to identify the root cause of the skepticism surrounding Agile methods and to examine a case study that provides relevant insights and context. The data for this analysis was collected through direct observation by one of the authors at the largest university in the United States. The paper will investigate how and why communication during an Agile transformation differs from other organizational transformations, focusing on the fundamental frameworks essential for supporting the Agile transformation and its communication strategies. The findings suggest that a critical factor in addressing skepticism toward Agile methods is the establishment of a well-defined foundation of terminology, which is key for fostering effective and efficient communication. In an Agile organization, awareness and understanding of terminology should be embedded in the organizational culture.

Keywords: agile organization, strategic communication, organizational communication, skepticism, terminology

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INTRODUCTION

Agile is an umbrella term that covers a variety of approaches and methods designed to enhance flexibility, collaboration, and efficiency in software development and project management. The term *agile* as an adjective, can appear in different combinations: *agile* approach, *agile* method, *agile* technique, *agile* framework, *agile* mindset, *agile* life cycle, project lifecycle, *agile* project delivery, and *agile* aspects of organizational design. As a noun, the term agility can also be combined in different ways, such as project agility and the concept of agility.

The *agile project management* method typically contrasts with the traditional (predictive) method. The *Agile Manifesto* (2001) set out four core values:

1. The importance of personal communication (individuals and interactions over processes and tools).
2. The ability to deliver a workable end product (working software over comprehensive documentation).

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3. Working closely with the customer (customer collaboration over contract negotiation).
4. The ability to change (responding to change over following a plan).

The *Agile Practical Guide*, published in 2017 as a PMI standard, aims to provide practical guidance for project managers and team members using agile for project planning and implementation. Agile techniques and approaches have become widespread in organizations as they effectively implement and manage new technologies, supporting customer satisfaction (Hornyák, 2020).

Although agile methods were initially associated with software development, they are now used across various industries, including manufacturing, education, and healthcare. In education, for example, agile principles can help manage distance learning and prepare students for life and careers in the 21st century. As a result, educational leaders developed the *Agile Schools Manifesto* and *The Twelve Principles of Agile Schools*[1], while the Scrum Alliance created *The Agile Educator Guide and Certification*[2].

Iterative, incremental, and agile approaches work well in areas that require research and development, face significant change, have unclear requirements, involve uncertainty or risk, or where the end goal is difficult to define. Di Fiore et al. (2019) note that agile practices have not widely penetrated R&D in science-driven businesses but observe the rise of "agile science" characterized by flexible and context-specific use of agile methods and tools. They highlight four points for "agile science movement": 1. anticipate skepticism, 2. emphasize the "why," 3. implement flexibly, and 4. organize around the right teams. Large organizations often face skepticism regarding agile transformations. Barlow et al. (2011) recommend how established organizations can implement agile successfully.

This paper aims to evaluate the validity of skeptics' arguments while providing analysis to challenge those arguments by offering proper context. It also examines how communication during an agile transformation differs from other organizational changes by analyzing the frameworks essential for supporting agile transformation and communication. Even if an agile organization has accepted characteristics, it may fail without clear, effective communication rooted in common terminology and understanding.

The first part of this study explores the characteristics of transitioning from traditional to agile methods and identifies the overlooked foundation for successful communication, which contributes to skepticism toward agile. The second part presents a descriptive case study from the largest US university, using data collected through direct observation by

[1] *Agile Based Learning: What Is It and How Can It Change Education?* Posted: February 22, 2014. https://www.opencolleges.edu.au/blogs/articles/agile-based-learning-what-is-it-and-how-can-it-change-education. Downloaded: 09 20 2023

[2] *The Agile Educator Guide. An Agile Framework for Modern Education.* September 2021. https://www.scrumalliance.org/ScrumRedesignDEVSite/media/ScrumAllianceMedia/Certification/Guide_to_Agile_K-12_Education.pdf. Downloaded: 09 20 2023

one of the authors. This case study selection follows the Six Sigma methodology's measure phase, and it focuses on identifying root causes. A root cause analysis conducted in the summer of 2023 revealed a misalignment in terminology.

It is important to note the limitations of this research methodology. Collecting a larger data set and conducting additional case studies on multidisciplinary projects in organizations using agile methods would be beneficial.

1. COMMUNICATION AND TERMINOLOGY

1.1. COMMUNICATION IN AGILE ORGANIZATIONS

The key to the organization's competitiveness and long-term success is an innovative approach and mindset, which can only be achieved with the right strategic approach. Projects are the means to achieve strategic goals in the organization and are also the vehicles for change. Projects move companies from a current state to a desired future state. From this point of view, the project is, therefore, a vehicle for innovation, a field of innovation for organizations (Cserháti, 2023). An agile project will be more successful if the organization supports it. Therefore, the organization needs change management. The culture always influences the adoption of agile approaches.

Organizational change management (OCM) and organizational communication are areas related to agile project management. Organizational communication is primarily concerned with communication within organizations, i.e., it studies the communication processes within existing organizations. Organizations are constructs that cannot exist without communication (Borgulya, 2017; Borgulya–Konczosné Szombathelyi, 2017, 2019; MacDonald–Mitra, 2019; Mumby–Kuhn, 2019). Organizational communication distinguishes between the external and internal communication of the organization (Borgulya et al., 2016). The effective functioning of an organization requires a coherent concept to achieve integrated corporate communication. Among other things, integrated communication helps to share knowledge, involve employees in processes and their renewal, support joint thinking, and implement individual ideas. This requires a well-developed strategy and detailed procedures. The alignment of units, organizational levels, and processes is significantly influenced by corporate culture and facilitated by introducing process management systems.

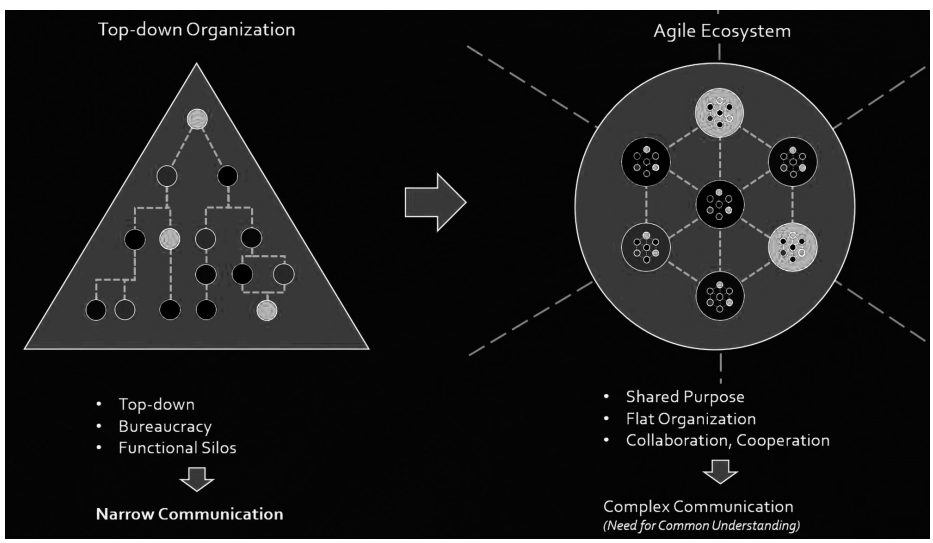
In this framework, it is important to recognize and define a) the lack of documentation and b) what is worth documenting. Agile methods, especially Scrum, are often viewed as most effective when minimal documentation exists. On the other hand, based on terminology management practices, it is important to collect the terminology used by the organization (in a glossary or terminology database), the terms, and their meanings (definitions), and prepare a term-based hierarchical system.

1.2. TRANSFORMING THE ORGANIZATION FROM TRADITIONAL TO AGILE

Communication in agile organizations requires organizational transformation, strategic marketing, and strategic flexibility: it requires a network of self-managing and dynamic teams. Agile communication is a task for all management functions, starting from top management, but it requires transforming the whole organization. Information technology (IT) and artificial intelligence (AI) solutions can support agility if the developments are aligned with the organizational context.

Figure 1 pictured the transition from a top-down organization to an agile ecosystem. The characteristics of the top-down organization are that the communication is going from top to down, there is bureaucracy, and there are functional silos. The consequence of this organizational structure is a narrow and mostly unidirectional communication. The characteristics of an agile ecosystem are a shared purpose, a flat organization, and collaboration and cooperation between the members and parts of the organization. The consequence of this organizational structure is a need for complex communication that fuels the need for common understanding.

Figure 1 From Top-down Organization to Agile Ecosystem



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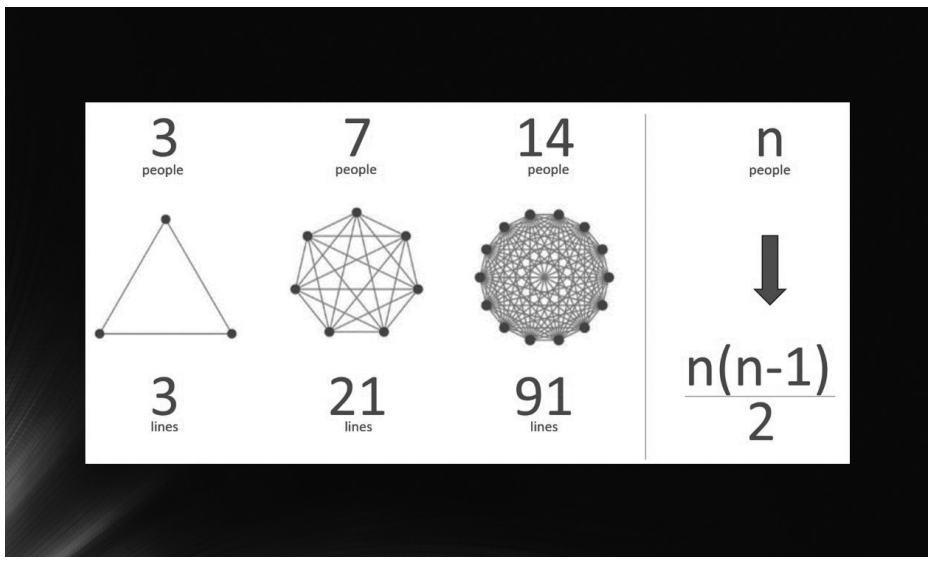
An agile organization can adapt quickly in a dynamically changing environment. A network of self-managing and dynamic teams provides strategic flexibility in an agile organization. Agility can also be used to develop structural and contextual dual capability. Agility tends to support exploratory activity and is not an effective solution above a certain company size, in relatively stable environments, or for certain organizational functions (Csedő–Zavarkó, 2019).

However, matrix organizations and self-organizing teams rely on effective and efficient communication, and as the number of stakeholders increases, so does almost exponentially the number of lines of communication (Figure 2). Suppose we know the number of critical nodes in an organization system (where "n" is the number of nodes). In that case, we can use the formula below to calculate the total number of communication acts required to transfer information to all nodes: n (n-1)/2 (Project Management Institute, 2021). The more complex the communications network becomes, the more important it is to have well-understood terms.

Figure 2 Lines of Communication



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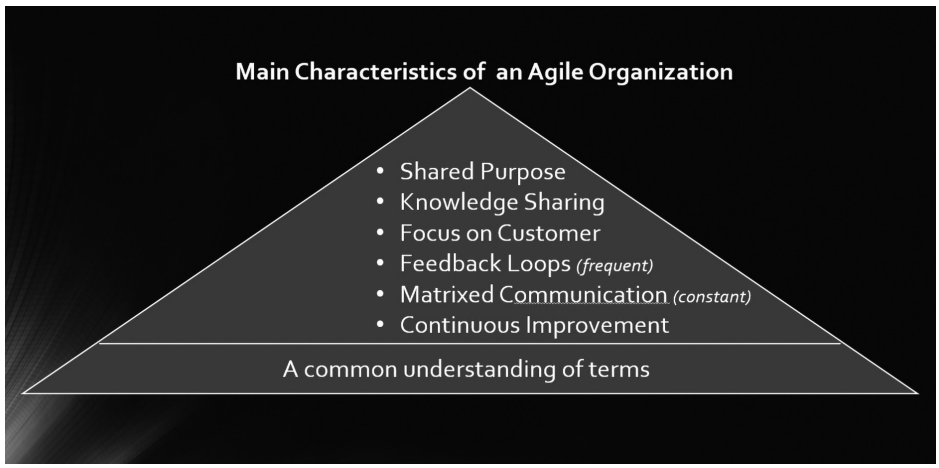
Our assumption (see Introduction) was that even if all normally accepted characteristics are present in an agile organization, the organizations can fail to execute if a fundamental and decisive cornerstone of agile, effective, and efficient communication is undermined without the proper lack of definitions and a common understanding of terms.

The main characteristics of an agile organization are shared purpose, knowledge sharing, focus on the customer, frequent feedback loops, constant matrixed communication, and continuous improvement (Figure 3).

Figure 3 Overlooked Foundation for Successful Communication in an Agile Organization



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If language, terms, and definitions are not standardized or harmonized inside the organization, this leads to ambiguity and misunderstanding. A common understanding of terms is the basis of the successful organizational transformation to agile and the successful communication in an agile organization (see Fóris–Kerner, 2022).

2. A CASE STUDY: THE PROCESS OF THE LEARNERS ENTRANCE INTO THE UNIVERSITY

To illustrate our assumption, we examined a case at Western Governors University, the largest university in the United States, where more than 8,000 staff support 175,000 students pursuing bachelor's or master's degrees (Western Governors University, 2023). Every student at this university has an individualized learning path, and 180 new students start their academic journey there every day. To manage this, the organization is already a mature agile organization. This status allowed us to isolate most factors that typically cause skepticism and resistance to agile methods by reviewing the root causes of failure.

The combination of many students, each following an individualized learning path, requires complex processes that can only be supported by an agile organization. However, even within such an environment, agile sometimes fails—not because the organization lacks the agile mindset and habits—but because, as shown, communication, the fundamental tool for agile process alignment, can grow exponentially in density. This increase in communication density can cause the exchange of information to lose cohesion, leading to divergent process executions that ultimately result in various types of friction. In these instances, five types of friction can occur:

1. Friction between the student and their academic journey.
2. Friction between the student and the staff.
3. Friction between the academic journey and the staff.
4. Friction between the student and the study materials.
5. Friction between the staff and the study materials.

When friction is identified in the discovery phase, the Business Process Optimization Engineer (BPOE) brings all stakeholders together to review the complex processes. The team often notices that the process map identifies the necessary steps, yet the stakeholders contradict each other when discussing identical steps. In these cases, the team starts to identify and record the various terms used and collect the various understandings of the terms. Most people define terms through contextual interaction with a new term. Context has a great influence on how stakeholders use them.

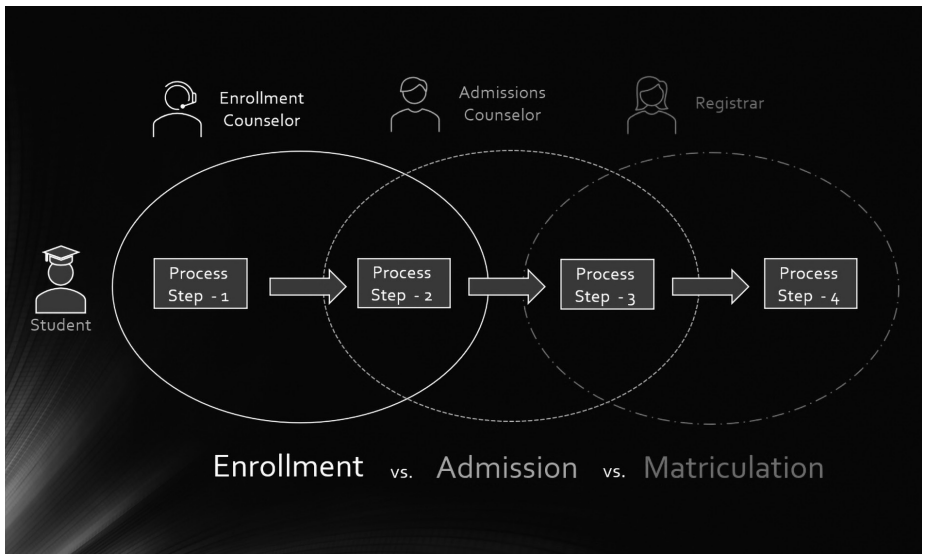
In our study, the team has been working on the learners' entry into the university, which involves three distinct domains: enrollment, admissions, and matriculation.

This is the first example of a discrepancy in terminology. Colloquially, we use the term *student* to refer to anyone who 'wants to study and studies at a university'. However, in the strictest sense within the university, the term *student* is defined as 'someone who has been admitted and matriculated into the university'. Before that stage, the individual is referred to as a *learner,* meaning 'a person who wants to study or is studying at a university". These differing definitions in colloquial and domain-specific contexts can create conflicts, leading to process designers and programmers developing two types of interactions that may be incompatible.

The second example is when a future student or learner arrives at the university, applies, enrolls, is admitted, and matriculates. In this process, three domains overlap (Figure 4): *enrollment, admissions,* and *matriculation.* These domains intersect as each handoff is iterative and agile rather than a singular, isolated event.

However, this creates a situation where the student's status is not always clear because, technically, the term *enrollment* has a specific definition with a distinct set of boundaries where all application documentation has been collected and recorded. The enrollment counselors have control of their domain only, and as human beings, they need to identify the handoff where someone else takes over. This feeds back into the context that defines their concept of *enrollment*. This is similar to the admissions counselors, who need to know when to take over. However, in reality, their understanding of the term contradicts how they work, resulting in friction.

Figure 4 Domain Overlap in an Organization



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In this case, after collecting the contextual definitions, it was the project team's role to work with the stakeholders to understand and accept the fact that the terms can and do overlap, and in order to fulfill the agile behaviors, it is critical to not only understand their domain-specific terms but also the terms of the domains they interact with.

While working with the stakeholders, the project team realized that breaking their term definition habits would be even more difficult, as they are constantly „retrained" back into their old habits. The reason is that the systems and software they use have hardcoded definitions of terms, and sometimes, the terms used are only different to create a marketing distinction by the software companies. Some examples of this are *Worktag vs. Project code* and *Webpart vs. Widget.*

The standards always require a glossary of terms to be prepared at the start of a project, but this is mostly generic and provides a single definition for each term without considering the possibility of multiple contexts in internal communication. For this organization, we changed this by considering a multidimensional definitional context, i.e., staying with the example; we provide separate definitions for the terms *student* and *learner* for each of the three domains (*enrollment, admission, matriculation;* def. 1, def. 2, def. 3). The second task is to collect the different terms used for the same concept (i.e., synonyms) in the different domains and departments.

3. CONCLUSION

This study aimed to assess the veracity of the arguments put forth by skeptics regarding the agile transformation. The research concentrated on how and why communication during agile transformation differs from any other transformation by analyzing the fundamental and decisive framework critical in supporting such an agile transformation and the associated communication approach. First, the main characteristics of transforming an organization from traditional to agile were examined, and the foundation for successful communication in an agile organization was identified. This foundation was often overlooked, resulting in skepticism towards agile methods. Secondly, a descriptive case study from the largest US university was presented, employing a qualitative methodology. The data were collected through direct observation by one of the authors. The case study was selected based on the Six Sigma methodology used by the organization, where the measure phase includes a root cause identification. The root cause analysis was conducted during the summer of 2023 and revealed a terminological misalignment.

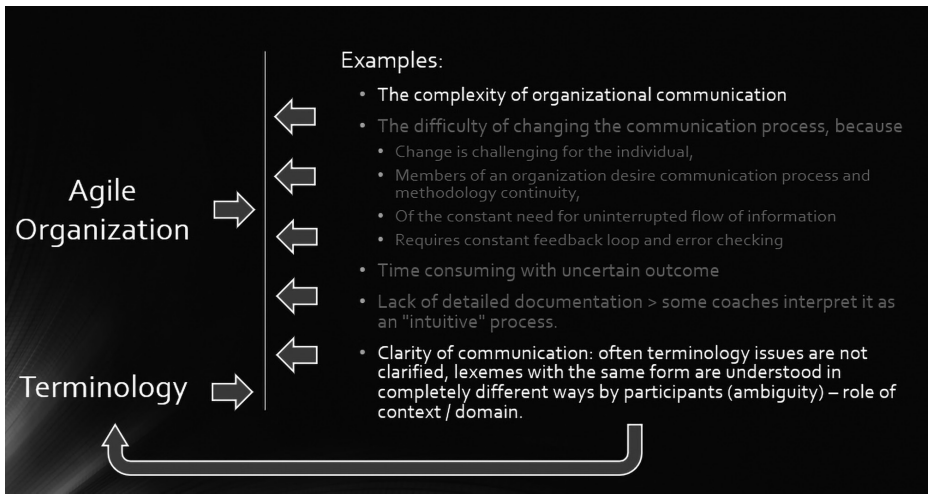
The conclusion, in general, is that most resistance to *agile transformation* results from poor change management. However, even if robust change management happens, frequently, skepticism about the implementation of agile methods can stem from several other factors, including (Figure 5):

- The complexity of organizational communication.
- The difficulty of changing the communication process because
  - change is challenging for the individual,
  - members of an organization desire communication process and methodology continuity,
  - of the constant need for uninterrupted flow of information,
  - requires constant feedback loop and error checking.

- The potential for time being spent with no certain outcome.
- The lack of detailed documentation (for example, some coaches interpret it as an "intuitive" process).

As we saw in the case study, terminology issues are often not clarified, and participants understand terms with the same form in completely different ways, causing them to create divergent outcomes and significant rework. When coupled with agile methods, where rapid change expectations create a feeling of urgency, communication misunderstanding will create the friction that fuels the skepticism towards agile. Clear communication is very important in the internal communication of agile organizations, where terminology plays a key role. Considering a multidimensional definitional context, a centrally managed and validated terminology database is the basis for consistent and correct corporate terminology. To this end, some companies are already producing AI-based terminology management solutions (Fleischmann–Lundahl, 2023).

Figure 5 Agile Organization and Terminology



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The *Agile Manifesto* and the literature emphasize the importance of clear communication based on consistency of terminology, not only in written texts but also in the everyday communication of the stakeholders. In agile project management, there is a particular need to define and constantly agree on terminology, and therefore, process stakeholders should be encouraged to keep terminological issues in mind. In an organization's communication, many domains meet and overlap, which can mean differences in the meaning of terms; for example, the same terms can denote different concepts in different domains. Harmonization of the work of agile teams is essential, and this should include harmonization of terminology.

In summary, one of the critical aspects to removing a root cause of skepticism toward agile transformation is a well-defined terminology foundation, thus enabling effective and efficient communication during the change process. In an agile organization, terminology awareness should be part of the organizational culture.

Organizations undergoing or having completed an agile transformation are advised to consider the following actions:

- Create an organizational terminology glossary or database that enables individuals and departments to describe and record terms, concepts, and conceptual systems.
- Continuously monitor organizational communication to ensure the terminology database remains relevant.
- Train individuals on effective communication and the proper use of terminology.
- Establish a new communication process and methodology, including clear process management and defined communication practices.
- Employ or train a Business Process Owner/Expert (BPOE) with expertise in terminology to understand and resolve terminology-related issues.

For future research, conducting analyses and developing case studies on large projects involving multidisciplinary domains within organizations that use agile methods would be beneficial.

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