

This chapter describes the approach taken in my research. It shows the considerations taken, the approach chosen, and how the research was conceived and conducted.

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## 2.1 Different Approaches

Organizational culture can be approached from different directions. Martin (2001) conducted some extensive research on the topic. She identified three theoretical perspectives in studies on organizational culture and named them “integration”, “differentiation”, and “fragmentation” (cf. Table 2.1). No perspective is in itself “right” or “wrong”. They all express different worldviews and have diverse advantages and disadvantages.

In short, integration studies focus on the perception that all mentioned cultural aspects are consistent and reinforce each other (cf. Martin 2001, p. 95). If deviations are found, they are seen as shortcomings that must be remedied. In contrast, differentiation studies “focus on cultural manifestations that have inconsistent interpretations” (Martin 2001, p. 101).

This means, “the integration perspective focuses on those manifestations of a culture that have mutually consistent interpretations. An integration portrait of a culture sees consensus (although not necessarily unanimity) throughout an organization. From the integration perspective, culture is that which is clear; ambiguity is excluded. [...] The differentiation perspective focuses on cultural manifestations that have inconsistent interpretations, such as when top executives announce a policy and then behave in a policy-inconsistent manner. From the differentiation perspective, consensus exists within an organization—but only at lower levels of analysis, labeled ‘subcultures.’ Subcultures may exist in harmony, independently, or in conflict with each other. Within a subculture, all is clear; ambiguity is banished to the interstices between subcultures. [...] The fragmentation perspective conceptualizes the relationship among cultural manifestations as neither clearly

**Table 2.1** How three theoretical perspectives complement each other

|                               | Integration perspective     | Differentiation perspective    | Fragmentation perspective              |
|-------------------------------|-----------------------------|--------------------------------|--|
| Orientation to consensus      | Organization-wide consensus | Subcultural consensus          | Lack of consensus                      |
| Relation among manifestations | Consistency                 | Inconsistency                  | Not clearly consistent or inconsistent |
| Orientation to ambiguity      | Exclude it                  | Channel it outside subcultures | Acknowledge it                         |

*Source* Martin (2001, p. 95)

consistent nor clearly inconsistent. Instead, interpretations of cultural manifestations are ambiguously related to each other, placing ambiguity, rather than clarity, at the core of culture. In the fragmentation view, consensus is transient and issue specific” (Martin 2001, p. 94). Generally, people working with an integration perspective have managerial interests in mind. Differentiation scholars are taking a critical stance and fragmentation researchers are not taking an explicit interest position (Martin 2001, p. 174).

Another aspect that has to be considered in analyzing organizational culture is that of specialist studies. “Specialist studies assume that one or a few manifestations can stand in for, or represent, an entire culture because interpretations of more types of manifestations would be consistent” (Martin 2001, p. 60). So while the integration, differentiation, and fragmentation perspectives describe the level of conformity sought for, the specialist aspect means that a few analyzed people or companies allow the researcher to make conclusions from that small data set and extrapolate onto a larger population like the whole company or industry. This stance poses the risk of overrating findings without having a truly representative data sample and thus drawing wrong conclusions.

Additionally, the method to gather data has to be chosen. Long-term ethnographies based on participant observation, short-term qualitative studies, textual and discourse analysis, and analyses of visual artifacts such as photographs are, according to Martin, counted as qualitative methods. Experiments, surveys, archival studies of large data sets, and content analysis (counts of categories of qualitative data) are considered quantitative research. The method chosen also has a huge impact on (and is sometimes impacted by) the type of study participants: “Whereas quantitative study participants are sampled so that they will be statistically representative of some larger population, qualitative study participants, called informants, are chosen because of their experience, lucidity, and willingness to talk openly with the researcher” (Martin 2001, p. 220).

The inclusion of those aspects is important because in general, methods choices, theoretical perspectives and interest orientations are correlated. “Quantitative studies usually assume the integration perspective and adopt a managerial orientation. In contrast, qualitative studies are more likely to assume differentiation or fragmentation perspectives and to adopt a more critical orientation” (Martin 2001, p. 234).

My study was written with a managerial interest and focuses primarily on the integration perspective, using mainly quantitative data. It also takes a specialist stance and assumes that from a relatively small data sample conclusions can be drawn to accurately describe the nature of Scrum. While some qualitative data was used as well, it was not the focus. As described above, the intended major outcome of this research was to find a culture model that accurately describes Scrum in order to help managers and researchers alike to better understand its implications. This is also reflected in the choice of literature: Harrison, Schneider, Deal and Kennedy, Cameron and Quinn, and Schein all take an integration perspective stance (cf. Martin 2001, p. 100). Following this focus, a suitable definition of culture had to be chosen. There are many different definitions available, where Schneider offers the most intuitive one: “Organizational culture is the way we do things in order to succeed” (1999, p. 128). This definition is used throughout this work.

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## 2.2 Model Selection

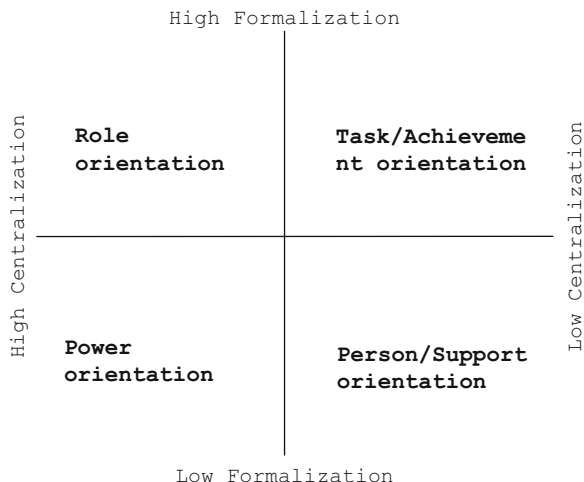
A multitude of organizational culture models can be found in literature. One of the first who created a thorough model based on empirical data was Harrison. He defined four different “organization ideologies” (1972) and named them “power orientation”, “role orientation”, “task orientation”, and “person orientation”. In a later publication (1987), he used the term “culture” beside the term “orientation” and renamed “task orientation” to “achievement culture” as well as “person orientation” to “support culture” (cf. Fig. 2.1). Harrison defines a power-oriented enterprise as “an organization that [...] attempts to dominate its environment and vanquish all opposition. [...] And within the organization those who are powerful strive to maintain absolute control over subordinates” (Harrison 1972, p. 121). A power-oriented organization is further described as “competitive and jealous” (ibid., p. 121); compliance is more highly valued than performance.

Power orientation can be found in companies with a background of family ownership or which are newly founded.

“An organization that is role-oriented aspires to be as rational and orderly as possible. [...] Competition and conflict [...] are regulated or replaced by agreements, rules, and procedures. [...] While there is a strong emphasis on hierarchy and status, it is moderated by the commitment to legitimacy and legality” (Harrison 1972, pp. 121–122). This means that in both the power- and the role-oriented enterprise all power is centralized, but while a power-oriented company exerts this power on a personal level, the role-oriented company has highly formalized processes and work instructions to apply this power. Harrison states, “most organizations we know, live with, and work in are a combination of the power-oriented and role-oriented models, with larger organizations tending toward the bureaucratic [role-oriented] mode” (Harrison 1987, p. 8).

“In the organization that is task-oriented, achievement of a superordinate goal is the highest value. The goal need not be economic. [...] The important thing is that the organization’s structure, functions, and activities are all evaluated in terms of

**Fig. 2.1** Harrison's culture model (Based on Harrison 1972, 1987)



their contribution to the superordinate goal. Nothing is permitted to get in the way of accomplishing the task. If established authority impedes achievement, it is swept away" (Harrison 1972, p. 122). Appropriate knowledge and competence is needed to gain authority. Harrison also describes this culture as fostering "deep personal satisfaction" (1987, p. 9) as well as evoking "strong personal commitment" in "high energy work situations" and links them to "new business and new plant startups, nuclear test shots, intensive care units, combat teams, and political and community organizing campaigns". He also points to "social service organizations, research teams, and high-risk businesses" (1972, p. 122). Task forces and project teams are also mentioned.

"Unlike the other three types, the person-oriented organization exists primarily to serve the needs of its members. The organization itself is a device through which the members can meet needs that they could not otherwise satisfy by themselves. [...] Authority in the role- or power-oriented sense is discouraged. When it is absolutely necessary, authority may be assigned on the basis of task competence [...]. Instead, individuals are expected to influence each other through example, helpfulness, and caring" (Harrison 1972, pp. 122–123). Harrison redefined this culture later as "an organizational climate based on mutual trust between the individual and the organization. In such an organization, people believe they are valued as human beings, not just as cogs in a machine" (1987, p. 13). He gives examples of small groups of professionals who have joined together for research and development as well as some consulting companies.

Harrison also states, "the pure support culture tends not to thrive in business unless it is balanced by a drive for success—an achievement orientation" (1987, p. 14).

Those "organizational ideologies", as Harrison called them back in 1972, are usually not found as pure types. However, usually a company focuses primarily on a single one.

Another pair of authors, who had a major impact on the field of organizational culture, especially when viewed from the managerial angle, are Terrence E. Deal and Allan A. Kennedy. They originally published their first book ‘Corporate Culture: The Rites and Rituals of Corporate Life’ in 1982. This book centered on the newly coined term ‘corporate culture’ and sparked a “firestorm of controversy” (Deal and Kennedy 2000b, p. 1), which again brought the concept of organizational culture to the attention of a wide audience.

Deal and Kennedy state in their original work, that “each company faces a different reality in the marketplace depending on its products, competitors, customers, technologies, government influences, and so on. [...] In short, the environment in which a company operates determines what it must do to be a success” (2000a, p. 13). This is notable, because the authors state that culture is shaped by outside influences rather than by the individuals inside the company, as most other authors suggest. This outside focus reflects in their corporate culture model, as can be seen in Fig. 2.2.

The process culture is defined as “a world of little or no feedback where employees find it hard to measure what they do; instead they concentrate on how it’s done” (Deal and Kennedy 2000a, p. 208). “How neatly and completely workers do something is often more important than what they do. [...] People who are valued in this culture are those who are trying to protect the system’s integrity more than their own” (ibid., p. 120). When looking for examples, the authors point to “banks, insurance companies, financial-service organizations, large chunks of government, utilities, and heavily regulated industries like pharmaceutical companies” (ibid., p. 119).

The work hard/play hard culture is described as a “world of small risks [...] and quick, often intensive feedback. Activity in this world is everything. [...] Success comes with persistence” (ibid., p. 113). “If the tough-guy culture is built on ‘find a mountain and climb it,’ then work hard/play hard rests on ‘find a need and fill it’” (ibid.). “While anyone who succeeds in a tough-guy culture becomes a star; here the team beats the world because no individual really makes a difference. The team produces the volume” (ibid., p. 114). The authors give some examples, which include primarily sales organizations such as real estate, automotive distributors, mass consumer-sales companies, office-equipment manufacturers, and all retail stores.

Deal and Kennedy define the tough-guy (also called “macho” or “stars”) culture as “the most grueling of all business cultures” (ibid., p. 108). The stakes are high and the feedback is quick. “Tough-guy, macho cultures tend to be young ones with a focus on speed, not endurance. Not taking an action is as important as taking one” (ibid., p. 109). People in this culture require a “tough attitude” and internal competition is high. This is a “world of individualists” where “outlaw heroes are the norm” (ibid., p. 110). Examples of this culture include construction, cosmetics, management consulting, venture capital, advertising, and publishing. Police departments and surgeons are described as the essence of this type of culture since the stakes there are often ones of life or death.

**Fig. 2.2** Deal and Kennedy's culture model (Based on Deal and Kennedy 2000a, b)



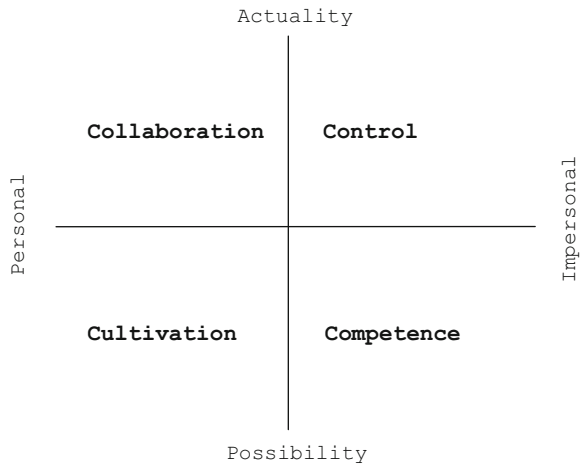
Bet-your-company cultures have to endure “high risk, but slow feedback” (Deal and Kennedy 2000a, p. 116). “Slow here doesn’t mean less pressure; instead it means pressure that is as persistent as low-drip water torture” (ibid.). “Instead of putting their careers on the line—as tough guys would—corporate bettors often risk the future of the entire company” (ibid., p. 117). “Decision-making comes from the top down—once all the inputs are in. [...] The values of this culture focus on the future and the importance of investing in it” (ibid.).

Industries exemplifying an inhibition of a bet-your-company culture include capital goods, mining and smelting, investment banks, and computer-design companies.

While many similarities between Harrison and Deal and Kennedy can be found, there are also—sometimes subtle—differences. William Schneider tried to work out those differences (and also those of other authors) to find a generally accepted and universal corporate culture model (cf. Schneider 1999, pp. 149–153). He builds on the work of other authors, amongst whom Harrison as well as Deal and Kennedy can be found. He also defines a four-square-matrix to describe his culture model (cf. Fig. 2.3).

The author describes the cultivation culture as “one of faith”, that “heralds a system of beliefs or expectations that the organization and its people will accomplish what it deems valuable. [...] This culture trusts unquestioningly in success, in its people and in the organization” (Schneider 1999, p. 82). The individual’s commitment and the fulfillment of worthwhile purposes create the energy and vitality of the cultivation culture. Schneider gives some industry examples as well: “Organizations dedicated to aesthetics are often cultivation cultures: symphony orchestras, theaters, artistic organizations, and some entertainment, advertising, and media graphics enterprises” (1999, p. 88). On top of that, Schneider mentions religious enterprises as additional examples.

**Fig. 2.3** Schneider's culture model (Based on Schneider 1999)



“The collaboration culture springs from the family” (ibid., p. 44). Its “way to success is to put a collection of people together, to build these people into a team, to engender their positive affective relationship with one another and to charge them with fully utilizing one another as resources” (ibid., p. 45). This means that destructive behavior and excessive self-interest do not go well with this culture. “Status and rank take a back seat” (ibid., p. 50). Examples include service organizations (such as health care organizations, especially hospitals), many family-owned and -operated businesses, nursing, entertainment, and many personal service enterprises.

In contrast, “control cultures prize objectivity. Emotions, subjectivity, and ‘soft’ concepts take everyone’s eye off the ball and potentially get the organization in trouble. Empiricism and the systematic examination of externally generated facts are highly valued” (ibid., p. 30). Important values in control cultures are order and predictability, as well as maintaining stability. “Decision-making is highly detached and impersonal” (ibid., p. 35). Examples mentioned by Schneider are energy companies, resource companies, defense, manufacturing companies, commodity or commodity-like enterprises, enterprises that have to do with matters of life and death as well as companies in mature markets.

In describing the competence culture, Schneider heavily refers to McClelland (1961). He argues “the competence culture is based in the achievement motive, discovered by McClelland in his research on individuals and societies and defined as man’s need ‘to compete against a standard of excellence’” (Schneider 1999, p. 63). Schneider continues to explain that, “the need to achieve has to do with accomplishing more and doing better than others” (ibid.). In a competence culture, being superior or the best is paramount. This can mean having the best product, service, process or technology in the marketplace. “This culture gains its uniqueness by combining possibility with rationalism. What might be and the logic for getting there are what count” (ibid., p. 65). Fundamental values are knowledge and

information. Formalities and emotional considerations are not important compared to proven accomplishment. “A competence culture values competition for its own sake even though it is not necessarily more competitive than other core cultures. There is a love of challenge; people like to be told that ‘it can’t be done’” (ibid., p. 68). Universities are described as being a natural competence culture prototype, which is also true for research and development organizations, many consulting firms, accounting firms, think tanks, and engineering construction firms.

Schneider provides a questionnaire (20 questions) in his book to classify any given enterprise into this culture model. However, this questionnaire was not statistically validated and therefore is of little scientific use (cf. Schneider 1999, p. 18).

Cameron and Quinn present a statistically validated and widely used tool to diagnose culture. It is called “Organizational Culture Assessment Instrument”, or “OCAI”<sup>1</sup> and is based on the Competing Values Framework, which is founded in the work of Quinn and Rohrbaugh (1983) (Fig. 2.4).

The culture model presented by Cameron and Quinn (2011) places organizations in a continuum of four core values, called Flexibility, Stability, Differentiation, and Integration. “What is notable about these four core values is that they represent opposite or competing assumptions. Each continuum highlights a core value that is opposite from the value on the other end of the continuum” (Cameron and Quinn 2011, p. 40). The authors have named the quadrants (cf. Fig. 2.5) in a way that resonates well with managers and researchers alike who have some knowledge in organizational culture frameworks. “It is important to note that these quadrant names were not randomly selected. Rather, they were derived from the scholarly literature that explains how, over time, different organizational values have become associated with different forms of organizations. We [Cameron and Quinn] discovered that the four quadrants that emerged from these analyses [Clan, Adhocracy, Hierarchy, Market] match precisely the main organizational forms that have developed in organizational science. They also match key management theories about organizational success, approaches to organizational quality, leadership roles, and management skills” (ibid.).

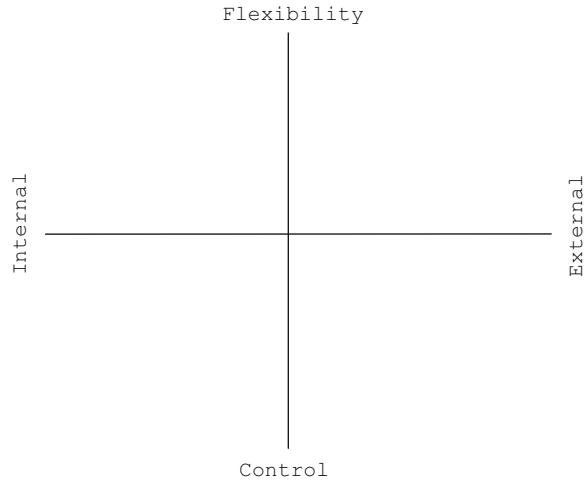
Hierarchy cultures emerge, because “the environment was relatively stable”. Due to that fact, “tasks and functions could be integrated and coordinated, uniformity in products and services was maintained, and workers and jobs were under control. Clear lines of decision-making authority, standardized rules and procedures, and control and accountability mechanisms were valued as the keys to success” (ibid., p. 42). A company with such an organizational culture is a “formalized and structured place to work. Procedures govern what people do. [...] Formal rules and policies hold the organization together”. “The long-term concerns of the organization are stability, predictability, and efficiency” (ibid.). In such an environment, “effective leaders are good coordinators and organizers. Maintaining a smoothly running organization is important”. Examples

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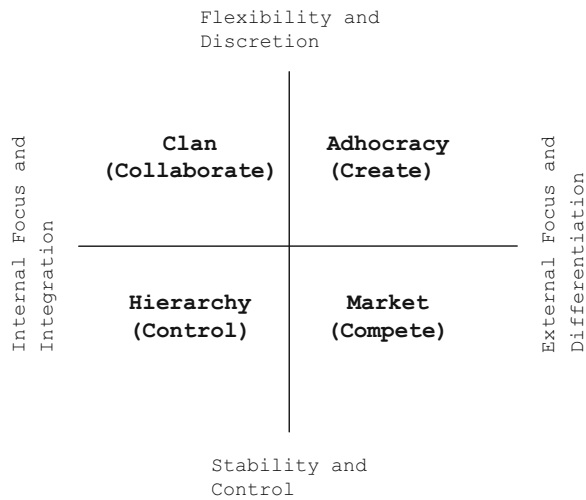
<sup>1</sup> ©Kim Cameron, University of Michigan.



**Fig. 2.4** The competing values framework (Based on Quinn and Rohrbaugh 1983)



**Fig. 2.5** Cameron and Quinn culture model (Based on Cameron and Quinn 2011, p. 39)



include “large organizations and government agencies [which] are generally dominated by a hierarchy culture, as evidenced by large numbers of standardized procedures, multiple hierarchical levels (Ford has 17 levels of management), and an emphasis on rule reinforcement” (ibid.). In general, “hierarchy cultures are characterized by a controlling environment” (ibid., p. 43).

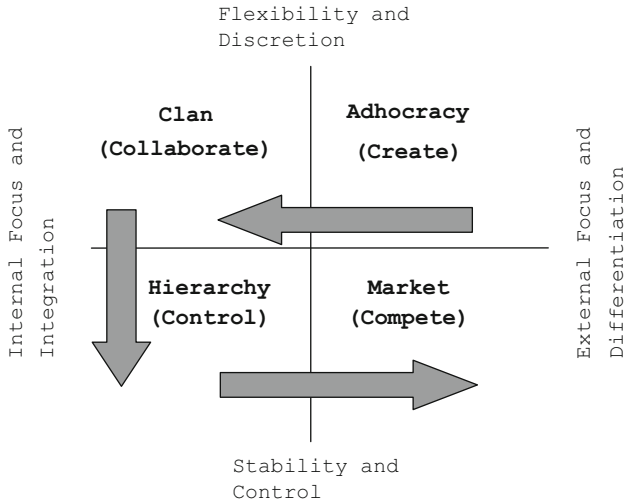
In contrast to the stable environment assumption of the hierarchy culture, “the basic assumptions in a market culture are that the external environment is hostile rather than benign, consumers are choosy and interested in value, the organization is in the business of increasing its competitive position, and the major task of management is to drive the organization toward productivity, results, and profits. It

is assumed that a clear purpose and an aggressive strategy lead to productivity and profitability” (ibid., p. 45). A market culture therefore has to be a “results-oriented workplace”. “Leaders are hard-driving producers and competitors who are tough and demanding. The glue that holds the organization together is an emphasis on winning, [and] the long-term concern is on competitive actions and achieving stretch goals and targets. Success is defined in terms of market share and penetration [while] outpacing the competition and market leadership are important” (ibid., p. 46).

The tough and demanding leader of the market culture will not last long in a clan culture. A more team-oriented approach is needed: “Basic assumptions in a clan culture are that the environment can best be managed through teamwork and employee development, customers are best thought of as partners, the organization is in the business of developing a humane work environment, and the major task of management is to empower employees and facilitate their participation, commitment, and loyalty” (ibid.). Sharing the same values, beliefs, and goals is paramount, especially in rapidly changing, turbulent environments. In general, the clan culture is “typified by a friendly place to work where people share a lot of themselves. It is like an extended family. Leaders are thought of as mentors and perhaps even as parent figures” (ibid., p. 48). Those leaders hold the organization together by loyalty and tradition, which leads to a high commitment. “Success is defined in terms of internal climate and concern for people. The organization places a premium on teamwork, participation, and consensus” (ibid.).

The fourth organizational form described by Cameron and Quinn is called adhocracy. “The root of the word adhocracy is *ad hoc*—implying something temporary, specialized, and dynamic” (ibid., p. 49). Adhocracies can be found in environments that are even more turbulent than those in which clan cultures thrive. “A major goal of an adhocracy is to foster adaptability, flexibility, and creativity if uncertainty, ambiguity, and information overload are typical” (ibid.). The authors found a number of characteristics that are common in this type of organization: No organizational charts due to the frequently and rapidly changing structure, temporary physical space, temporary roles and responsibilities depending on changing client problems, as well as creativity and innovation were the most visible ones. “In sum, the adhocracy culture [. . .] is characterized by a dynamic, entrepreneurial, and creative workplace. People stick their necks out and take risks. Effective leadership is visionary, innovative, and risk oriented. The glue that holds that organization together is commitment to experimentation and innovation” (ibid., p. 51). Quite often, “the emphasis is on being at the leading edge of new knowledge, products, and services. Readiness for change and meeting new challenges are important. The organization’s long-term emphasis is on rapid growth and acquiring new resources. Success means producing unique and original products and services” (ibid.).

Cameron and Quinn also found that “new or small organizations tend to progress through a predictable pattern of organization culture changes” (ibid., p. 64), starting in the adhocracy quadrant, evolving into a clan, and then a hierarchy culture until it finally settles into a market form, as shown in Fig. 2.6:



**Fig. 2.6** Culture change over time (Based on Cameron and Quinn 2011, pp. 64–65)

This cultural evolution is more or less inevitable. However, if properly managed, elements of other quadrants can be used to soften the weaknesses of the market or hierarchy culture. The necessary starting point for such action is to know what the company believes to be important today. That is, while the company as such may represent one of these quadrants, it might “indeed have a strong secondary component. This is also the case at the department/group level” (Tharp 2009, p. 5). It is rare however to “have companies that share equal traits of all four culture types—with no dominant or barely dominant type” (ibid.). Therefore, the use of this model might lead to a more sophisticated (and complex) result than the pure positioning in a single quadrant of a four square matrix.

The four models shown above describe different aspects of culture. Harrison focuses on how processes are conducted and decisions are made within a culture, that is, if they are centralized and formalized, or not. Deal and Kennedy focus on what kinds of decisions have to be made—are the stakes high and how quickly does the decision-maker know if the decision was right? Schneider focuses more on the general way of thinking in the decision making process. Does the decision-maker primarily think about people or the company? Is he focusing on the present or the future? Cameron and Quinn introduce the element of cultural evolution and focus on the values held dear by the organization: Flexibility, stability, differentiation, or integration.

It is hard to choose between these models in order to evaluate the cultural nature of Scrum. In particular Schneider, whose work was already used by another researcher (cf. Spayd 2010) to analyze Scrum, looks promising. However, Schneider’s work is not validated and the author no longer uses his own questionnaire to analyze corporate cultures (as far as I know). Due to the fact that validated

**Table 2.2** Decision matrix for model selection

|   | Harrison                               | Deal and Kennedy    | Schneider  | Cameron and Quinn                |
|---|--|---------------------|--|----------------------------------|
| Name of quadrants                                 | Achievement                            | Bet-Your-Company    | Cultivation  | Adhocracy                        |
|   | Person                                 | Work Hard/Play Hard | Collaboration  | Clan                             |
|   | Power                                  | Process             | Control  | Hierarchy                        |
|   | Role                                   | Tough-Guy           | Competence   | Market                           |
| Primary focus                                     | Process conduction and decision making | Kinds of decisions  | General way of thinking in the decision making process | Values held dear by organization |
| X-axis  | High/low centralization                | High/low risk       | People/company orientation                             | Internal/external focus          |
| Y-axis  | High/low formalization                 | Fast/slow feedback  | Actuality/possibility orientation                      | Flexibility vs. Stability        |
| Includes questionnaire by author                  | Yes (Harrison and Stokes 1992)         | No                  | Yes  | Yes                              |
| Questionnaire is statistically validated          | No                                     | n.a.                | No   | Yes                              |
| Central database exists for further research      | Yes                                    | n.a.                | No   | Yes                              |
| Model is still in practical use today             | No                                     | Yes                 | Yes  | Yes                              |
| Model has been used to analyze Scrum              | No                                     | No                  | Yes  | No                               |
| Is the author still basing his work on the model? | Unknown                                | Yes                 | No   | Yes                              |

quality, actuality, the availability of a central database and the generally sophisticated approach, the Cameron and Quinn model is chosen for this research project (Table 2.2).

## 2.3 A Broader View on Cultural Dimensions

Even though Cameron and Quinn created a sophisticated model that will lead to valuable insights, it might prove to not be sufficient. In order to understand the full complexity of the inherent cultural characteristics of Scrum, more than just a typology might be needed. “The value of typologies is that they simplify thinking and provide useful categories for sorting out the complexities we must deal with when we confront organizational realities. [...] The weakness of culture typologies is that they oversimplify these complexities and may provide us categories that are incorrect in terms of their relevance to what we are trying to understand. They limit our perspective by prematurely focusing us on just a few dimensions, they limit our ability to find complex patterns among a number of dimensions, and they do not reveal what a given group feels intensely about” (Schein 2010, p. 175). So with the Organizational Culture Assessment Instrument (OCAI), the dimensions of analysis might have been narrowed.

Broadening the horizon of this research could happen through a survey, expert interviews, or group workshops. In Schein’s opinion, “culture cannot be assessed by means of surveys or questionnaires because one does not know what to ask, cannot judge the reliability and validity of the responses, and may not want to influence the organization in unknown ways through the survey itself” (Schein 2009, p. 101). These concerns are well founded, but do not fit to the situation at hand. Since not one individual organization is assessed, there is no risk to influence an organization by means of a questionnaire. A survey is never reliable, but neither are interviews or workshops. However, by gathering a large enough data sample (e.g. 200), the significance can be statistically verified. To find out which questions to ask, one can consult literature: Even Schein himself (2009, 2010) gives ample examples of what to ask.

One additional issue eases the decision even more: that of pragmatism. The OCAI questions will be asked in a survey. Since the people answering that survey will be scattered all around the world and will be answering a questionnaire anyway, it is easy to add some more questions. Therefore, a survey approach is chosen. The only open issue is what questions to ask.

Schein divides what culture is about into three areas, of which the first one is obvious (and well documented in the case of Scrum):

### “External Survival Issues

- Mission, strategy, goals
- Means: structure, systems, processes
- Measurement: error-detection and correction systems

### Internal Integration Issues

- Common language and concepts
- Group boundaries and identity
- The nature of authority and relationships
- Allocation of rewards and status

### Deeper Underlying Assumptions

- Human relationships to nature
- The nature of reality and truth
- The nature of human nature
- The nature of human relationships
- The nature of time and space
- The unknowable and uncontrollable” (Schein 2009, pp. 39–40)

These aspects are a good starting point, which is backed by other authors as well. Martin states for example, that one of the first manifestations of culture an outsider encounters when entering it, is language that only cultural insiders are able to decipher (2001, p. 77), which matches Schein’s hint to “common language and concepts” (2009, p. 40). Martin also differentiates between technical and emotional jargon. “Technical jargon is task oriented and appears to be emotionally neutral. In contrast, emotionally laden jargon is more overtly concerned with feelings. For example, ‘idea hamsters’ on the ‘bleeding edge’ are metaphors of life and death in Silicon Valley, the U.S. Mecca for high-technology entrepreneurship” (2001, p. 77). Asking for technical jargon is easy: It manifests in all the acronyms and special statements only insiders understand. Emotional jargon is usually hidden, but it does surface in the form of humor (*ibid.*, p. 81).

Group boundaries are sometimes blurred. However, in some cultures membership badges, uniforms, special symbols or privileges are used (*cf.* Schein 2009, p. 55). In addition, people almost always have a fair understanding of who is an “insider” and who is an “outsider” of their culture. To find out what a group believes to be true about the nature of authority and relationships, more subtle questions should be asked to prevent people from answering in a socially acceptable way. Aside from inquiring how people are addressed, it should be investigated how discussions commence, and whose opinion is valued most in group meetings. The way in which disagreement with one’s boss is voiced—if at all—is an important indicator as well (*cf. ibid.*, p. 57). This should tell a lot about the underlying beliefs when considering the nature of authority.

In any given group, rewards and status have to be distributed, or as Schein puts it: “Every group must work out its pecking order, its criteria and rules for how someone gets, maintains, and loses power and authority. Consensus in this area is crucial to help members manage feelings of aggression” (2009, p. 94). In most companies, the primary way to get power and improve one’s status is by way of a promotion. On a smaller scale, rewards and punishments are relevant. To find out more about this issue, it should be asked what kind of behavior is rewarded or punished and how one knows (*cf. ibid.*, pp. 58).

The aspects of ‘human relationship to nature’ and ‘the nature of reality and truth’ are deeply rooted in the national cultures in which a company operates (*cf.* Schein 2009, p. 61). Since this study is not trying to analyze national cultures but rather cultural characteristics of Scrum, those aspects are not investigated. Human nature, however, definitely is relevant. The major question is whether people want to work, or do not want to work. McGregor, Herzberg, and others found that financial incentives might decrease motivation, but not increase it above a certain point.

Instead, personal challenges and the opportunity to use one's talents are needed (cf. McGregor 2000; Herzberg 2003). Commonly referred to as "Theory X" and "Theory Y", the first one assumes that people only work when "carrots and sticks" are used, while the latter believes that people are intrinsically motivated. In addition, it is generally assumed that people matching "Theory Y" are highly motivated and like coming to work, while those fitting "Theory X" do not. It is easy to ask people how they feel at work.

Assumptions about human relationships as such are difficult to inquire. While people might espouse group values, they might actually follow a more individualistic approach. While direct questions are risky, it is still helpful to ask for the espoused values. Questions regarding the leadership style and the focus of the company as such might reveal some useful information in that regard more indirectly.

Other cultural aspects, such as assumptions about space, can be identified more easily. "Architecture, interior décor, and dress norms are particularly powerful cultural clues, in part because they are so easy to see" (Martin 2001, p. 83). While it is not expected to find a single common architecture that permeates all Scrum organizations on the planet, there might be clues about office design. This information could be supplemented by asking for the perceived noise level: Is there a buzz of communication in an open-plan office or silent working behind closed doors? When looking at space, assumptions about time should not be forgotten. Is it perceived as controllable? This is especially important, since "planning time as used by most managers assumes that one can speed things up or slow them down according to the needs of the moment. If something needs to be done soon, we 'work around the clock' to meet the deadline. On the other hand, the R&D department is more likely to be working on 'development time,' [...] implying that the development of certain processes cannot be speeded up" (Schein 2009, pp. 70–71). The importance lies here in the fundamentally divergent concept of time, which could lead—if different amongst members—to conflicts in enterprises. Asking for overtime encouragement and monitoring intervals should reveal the underlying thought concept.

To finish this line of thought, it had to be investigated how Scrum deals with the unknowable and uncontrollable. This was straightforward. In addition, people were allowed to report on any visible artifacts or general ideas that might not have been covered by the other questions. Table 2.3 shows a summary of all identified questions.

With these questions supplementing those of the OCAI, a broad view on the cultural implications of Scrum could be gathered. While the questionnaire was longer than originally expected, this extension was necessary since "culture is a multidimensional, multifaceted phenomenon, not easily reduced to a few major dimensions" (Schein 2010, p. 91). That in mind, we can dig into the existing Scrum literature and mine some cultural gems.

**Table 2.3** Questions to deepen cultural insights

| Schein's category                     | What to find out                               | What to ask   |
|---------------------------------------|--|---|
| Common language and concepts          | Technical jargon                               | Specify all jargon and acronyms that might be common in a perfect Scrum company                               |
| Common language and concepts          | Emotional jargon                               | What jokes are common in a perfect Scrum company?   |
| Group boundaries and identity         | Dress norms                                    | What dress code is dominating in a perfect Scrum company?   |
| Group boundaries and identity         | Badges, Uniforms, symbols or privileges        | How are different degrees of status symbolized? Are there any sort of uniforms, badges, and so on?            |
| Group boundaries and identity         | Insider and outsider                           | Who is considered an "insider" or "outsider" in a perfect Scrum company?                                      |
| Nature of authority and relationships | Formal or informal relationship between people | Are people in a perfect Scrum company addressing each other on a first name basis or differently?             |
| Nature of authority and relationships | Formal or informal relationship with bosses    | Are people in a perfect Scrum company addressing their bosses on a first name basis or differently?           |
| Nature of authority and relationships | Pecking order in meetings                      | How would you describe behavior in group meetings?  |
| Nature of authority and relationships | Source of authority                            | Whose opinion is valued most in group meetings?   |
| Nature of authority and relationships | Openly voiced criticism                        | If you disagree with the boss, do you feel encouraged or discouraged to voice your disagreement face-to-face? |
| Nature of authority and relationships | Openly voiced criticism                        | Is it OK to disagree in front of others, or do you have to seek the boss out and disagree privately?          |
| Allocation of rewards and status      | How to gain power                              | How does promotion ("climbing up the ladder") look like in a perfect Scrum company?                           |
| Allocation of rewards and status      | What is rewarded                               | What kind of behavior is rewarded in a perfect Scrum company?   |
| Allocation of rewards and status      | What is punished                               | What kind of behavior is punished in a perfect Scrum company?   |

(continued)



**Table 2.3** (continued)

| Schein's category                 | What to find out                                    | What to ask   |
|-----------------------------------|---|---|
| Allocation of rewards and status  | Reward mechanisms                                   | How do you know when you have been rewarded or punished in a perfect Scrum company?   |
| The nature of human nature        | Are people intrinsically or extrinsically motivated | In a perfect Scrum company: Does management believe that people want to work (intrinsic) or do they believe people need external (extrinsic) motivators to work (e.g. money)? |
| The nature of human nature        | Like people coming to work                          | How does work feel in a perfect Scrum company?  |
| The nature of human relationships | Espoused values                                     | What values are espoused in a perfect Scrum company?  |
| The nature of human relationships | Focus   | What is a perfect Scrum company focusing on?  |
| The nature of human relationships | Leadership style                                    | How would you describe the leadership style in a perfect Scrum company?   |
| Nature of Space                   | Office design                                       | What does the working space look like in a perfect Scrum company?   |
| Nature of Space                   | Communication amount in the environment             | How would you describe the noise level in a perfect Scrum company?  |
| Nature of Time                    | Overtime encouragement                              | Is working overtime encouraged or despised in a perfect Scrum company?  |
| Nature of Time                    | Monitoring intervals                                | How long is an employee left alone without being monitored in a perfect Scrum company?  |
| Unknowable and Uncontrollable     | How is it dealt with                                | How does a perfect Scrum company deal with the Unknowable and Uncontrollable?   |
| General                           | Missed artifacts                                    | What artifacts ("important tangibles") are visible in a perfect Scrum company?  |
| General                           | Missed ideas  | What else do you want to point out in regard to the nature of Scrum?  |



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