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Critical HR capabilities in agile organisations a cross-case analysis in swiss SMEs

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Abstract

The current agile management literature is missing insight about the challenges agile organisations face regarding human resource management (HRM/HR) – and how they may overcome them. Based on an exploratory case study design, we investigate the managerial challenges in seven pioneering companies, all of them medium-sized firms (SME) from the IT sector in Switzerland. The majority of the qualitative data gathered stems from interviews, that was coded along emerging themes. The results are divided into three sections: a proposed (1) *typology for Business Agilists*, (2) *general challenges* and (3) *emergent agile HR capabilities*. Following the proposition of agile HR as a distributed capability, we discuss several theoretical and practical implications. In essence, particular attention is to be placed on a cultural fit between employees and the agile working environment, which demands individuals to be highly self-reliant and autonomous. This entails the need for a flexible support structure to grow employees' skills accordingly. The conclusion emphasises addressing the shared responsibility for HR work and the corresponding broad capability development of different role holders, resulting in the suggestion to replace the term HR with *people management* as a more inclusive bracket for integrative HR, culture and leadership work in agile organisations.

Keywords HRM · People management · Agile · Business agility · Case Study

1 Introduction

Agile frameworks are increasingly being introduced to transform whole organisations, in a quest to deal with complexity and uncertainty. According to Charbonnier-Voirin (2011), organisational agility is associated with attributes such as responsiveness,

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quickness and learning. When agile principles are incorporated throughout a whole organisation, we refer to these organisations as *Business Agilists*. The drivers are manifold. Externally, organisations are confronted with disrupting business models and dynamic markets, pluralistic and diverse value patterns, and digitalisation (Meyer et al. 2017, p. 534; Harraf et al. 2015, p. 675; Saha et al. 2017, p. 326). Internally, employees demand mobile-flexible, meaningful and fulfilling work (Coates 2017, p. 63; Rigby et al. 2016).

Agile transformations are not merely a methodological issue, but involve numerous HR challenges, as they essentially require designing an organisation around human needs to learn, share and connect (Tolchinsky 2015, p. 60). Existing research also questions the viability of staff functions such as HR, which traditionally organise people aspects (Laloux 2014, p. 71). In contrast, current HRM literature is still strongly influenced by Ulrich's business partner model that emphasises the strategic role of HR professionals in coordinating the whole employee lifecycle (Brockbank and Ulrich 2009; Ulrich 1997). Despite high practitioner interest, there is a distinct lack of academic activity to "address the science-practice divide" concerning the role of HR in agile organisations (McMackin and Heffernan 2020, p. 11). **This study aims to identify the main characteristics that typify agile transformations, with a focus on HR in knowledge-intensive SME in the Swiss IT sector.** To address this research gap, our paper concentrates on the following questions: **how do organisations use HR practices to foster agility? And what are the implications for HR agents in terms of requirements, roles or focus?**

This paper is structured as follows: after setting the context of agile organisations and the implications for HR work, the research design is discussed. The result chapter then describes HR practices in the companies studied, interprets them against the chosen heuristic framework and condenses management challenges associated. Finally, the article discusses theoretical and practical implications for the incorporation of agility into HR capabilities and practices.

2 Organisational agility and HR capabilities

Despite a growing number of academic papers, the theoretical framing of agile organisations, and the corresponding role of HR, remains difficult. The different strands of the emerging literature may be condensed into a *threefold purpose HR fulfills in agile organisations*. *Firstly*, regarding organisational development, HR facilitates the structural and cultural conditions for promoting agility – in particular by promoting self-organisation, shared values and collective decision-making, and by supporting the organisation in mobilising resources flexibly (see Chaps. 2.2 and 2.3). *Secondly*, HR supports continuous, collective learning and adaptation processes, and an open exchange of information (see Chap. 2.3). *Thirdly*, HR expedites participative development of the business strategy, scans strategic influencing factors, and empowers leaders to make courageous, fast decisions (see Chap. 2.4).

2.1 Maturity models of organisational agility

The emerging literature differentiates between "doing agile" and "being agile" (Fernandez and Fernandez 2008, p. 16). These descriptions represent whether organisations simply implement tools and terminology, or incorporate the underlying *values and principles* as well. This value-orientation can be used as a decisive factor for classifying organisations into maturity levels. Accordingly, Werder and Maedche (2018) separate three states of maturity in agile organisations, i.e. (1) starting or (2) being in the middle of their transition, and (3) being more mature in their organisational agility. Aghina et al. (2020) developed the following criteria to comprehensively assess agility maturity in large organisations: (1) a shared purpose and vision embodied across the organisation, (2) a network of empowered teams, (3) rapid decision and learning cycles, (4) dynamic people model that ignites passion, (5) next-generation enabling technology. Our study focuses on mature *Business Agilists*, in order to streamline resources towards companies that are likely to exhibit HR practices that may be characteristic for agile organisations.

Only few studies have examined the resulting agile organisational culture (see e.g. Siakas and Siakas 2007). Based on a literature analysis, Rebentisch et al. (2018) have derived the following eight dimensions of agile culture: (1) fast, team driven decision-making; (2) willingness to continuously learn and improve; (3) autonomy and empowerment of people; (4) supportive and collaborative management; (5) team orientation; (6) intensified personal communication; (7) open information sharing and (8) comfort with change and uncertainty.

SMEs seem particularly numerous amongst Business Agilists. Already marginally bureaucratic and hierarchic, and with a certain openness to change and pragmatism, SMEs show a strong disposition for agile frameworks (Damanpour 2010, p. 997). Business agility feeds into SME-typical attributes, such as their resourcefulness, ability to make bold yet viable decisions or fluidly reconfigure resources accordingly (Arbussa et al. 2016, p. 289). Rauch and Hatak (2016, p. 487) directly connect an SME's performance to its ability to enhance employee skills, motivation, and empowerment, concepts that seem to be essential in agile frameworks. With limited resources, however, experimenting with HR practices comes at a high price (Meyer et al. 2017, p. 542).

2.2 Organisational agility and the concept of self-organisation

How can agility be promoted throughout the whole organisation? The management framework *Holacracy* provides a practical answer to this question. This sociocratically (Endenburg and Pearson 1998) informed concept goes back to Robertson (2015), who designed an elaborate blueprint for distributed decision-making. In the following years, an increasing number of companies started to experiment with similar approaches to self-organisation, in an attempt to cope with their ever-changing environment (Atuahene-Gima 2003; Kettunen et al. 2019). While agile management frameworks currently seem to gain traction, their underlying concepts are far from new. The organisational development possibilities of abolishing hierarchical structures and decision-making have been discussed by systems theorists since the 1990s.

Luhmann (1995), for instance, describes organisations as social systems that can only change from within themselves. As such, organising through planned intervention is only possible to a restricted extent (Malik and Probst 1984; Probst 1987) describes this self-generation of order as an emergent phenomenon in a social system. This order is characterised by a spontaneous and unintentional character and is the result of multiple experiences, interactions and decisions. Self-organisation implicates a *polycentric system with self-coordination and reciprocal, participatory adaptation and change of* behaviour. The principle of *distributed authority* is an operational formula that promotes emergent decision-making processes. Against this backdrop, the Holacracy movement mentioned above may be interpreted as a contemporary attempt to support self-organisation by influencing communication and decision-making systems, rather than individual functionaries.

So far, we have recognised that Business Agilists show characteristics of self-organising social systems and that SMEs seem to be typical first movers. This systemic-holistic perspective emphasises the usefulness of culture- and context-bound interventions. However, the existing literature fails to provide implications for the development of the agile HR capabilities associated. To reflect on these, we turn to established *management frameworks* that offer approaches for coping with complexity and change.

2.3 Management capabilities for a dynamic-agile environment

At the *team management level*, agility emerged in the 1990s as a bottom-up counter-movement to traditional project management methods, whose rigid up-front planning failed to serve evolving customer needs. Agile project management can be described as a set of *values and principles* that act as a compass for decision-making and aligning practice on a team level. Primarily, these principles define teams as cross-functional and self-organised, while being trusted to accomplish the job. Orientated towards customer needs, these self-regulated teams adjust actions frequently to changing requirements and new insight, ensuring continuous improvement and collective learning (Parker et al. 2015, p. 112–113; Polley and Ribbens 1998). According to Moravec (1999), introducing self-organised teams requires building mutual understanding and allowing all team members to develop leadership skills.

Agile practices are nowadays mainstream in software development, and are increasingly applied to other functional areas (Kettunen et al. 2019). Unsurprisingly, IT companies are at the forefront of business agility – often as an organic spill-over from project management. These knowledge-intensive service organisations depend on maximising their flexibility, ability to collaborate and innovate on a competitive global market (Nielsen and Montemari 2012, pp. 145–146). This makes them dependent on sourcing talent in a labour market where a lack of skilled workers poses a major challenge (Spring Professional 2020).

The principles described have many references to the dynamic capabilities on a *strategic management level*. Peters and Austin (1985) and Moss Kanter (1985) first used the term *agility* in the 1980s, describing the ability of excellent companies to adapt to market changes – distinguishing them from rigid bureaucratic organisations. Across the following decades, their ideas were picked up by others. According to

Doz and Kosonen ([2008](#), p.96) strategic agility results from the combination of *three major meta-capabilities*:

(1) *Strategic sensitivity* (i.e. a strong externally oriented and internally participative strategy process, a high level of attentiveness, and an intense, and open internal dialogue).
(2) *Leadership unity* (i.e. the ability of the leadership team to make fast, courageous decisions).
(3) *Resource fluidity* (i.e. the internal capability to reconfigure business systems and redeploy resources rapidly).

The last aspect particularly relates to the research findings of Teece et al. ([2016](#), p.18). They link agility to *dynamic capabilities*, which can be divided into three clusters:

(1) *Sensing of unknown futures* (i.e. identification, co-development, and assessment of opportunities and threats in relationship to customer needs).
(2) *Seizing* (i.e. mobilisation of resources to address needs and opportunities and capture value).
(3) *Shifting* or *transforming* (i.e. continued renewal).

Dynamic capabilities are deeply embedded in the organisation, hard to acquire or imitate, and require *entrepreneurial management* qualities – and thus largely depend on knowledge workers and experts (Teece [2017](#), p. 698).

Laloux ([2014](#)) examined companies that are economically successful through agile principles (i.e. focus on current problems instead of goals or decentralisation). His case studies highlight the capability to empower self-organised teams in agile transformations. While this is old news, organisations still find it difficult to switch from a hierarchical structure to a context where teams assume responsibility for their own decisions (Moravec [1999](#)).

The approaches introduced above offer a good basis for reflection, especially at a strategic management, leadership and team development level – yet exclude concrete implications for HR.

2.4　HR capabilities for a dynamic-agile environment

Our research looks at Business Agilists through an HR lens. In agile organisations, the HR focus shifts from individuals to whole networks of people in cross-functional relationships (Appelbaum et al. [2017](#), p. 12). These highly collaborative networks define an organisation's "capacity of transformation and innovation" (Charbonnier-Voirin [2011](#), p. 148). While people development and leadership therefore become a major focus when designing agile organisations, HR is still under pressure to prove itself as a driver of agility (Saha et al. [2017](#), p. 326).

In this context, McMackin and Heffernan (2021) differentiate between "HR for Agile" and "Agile for HR". The first concept refers to the design of HR systems to support agile organisational development, while the second refers to applying agile principles to existing HR functions, as a purely operational strategy. This paper

focuses on "HR for Agile": highlighting the critical role of HR capabilities for agile transformation (Bonavia and Marin-Garcia 2011).

The result of "HR for Agile" is an agile workforce built around dynamic talent that adapts easily to change and delivers skills in a dynamic way (Heilmann et al. 2020). This is especially important for organisations co-creating together with their business partners (Nielsen and Montemari 2012). An agile workforce enables scalability by guaranteeing both flexibility and strategic alignment of the skills needed in the organisation (Wright and Snell 1998). It all depends on "the speed and ease with which transitions are made from one aligned human resource configuration to another" (Dyer and Ericksen 2006, p. 12). Accordingly, the relevance of dynamic capability development in HR work cannot be overstated, especially considering the strong tendency of Business Agilists to rely on self-organisation. Based on these theoretical perspectives, the role of the HR profession faces a new set of expectations – especially considering the diffusion of staff functions and the embracement of role-based approaches. So, how can these critical capabilities be fostered in agile organisations – if HR does not want to stop at merely adopting "agile lite" (Cappelli and Tavis 2018, p. 47)?

3 Research design

As outlined earlier, the existing literature provides little insight into HR aspects in agile organisations of any size (McMackin and Heffernan 2020, p. 11). Chapter 1 established our research interest as identifying which HR practices contribute to business agility and what knowledge potential can be derived from pioneering companies. To illuminate this matter, we opted for an exploratory, data rich design (Eisenhardt and Graebner 2007; Yin 2018).

Multiple-case studies (Eisenhardt 1989; Yin 2018) are suitable for studying such a contemporary phenomenon in its real-life context, especially when variables, boundaries and context remain unclear (Eisenhardt and Graebner 2007; Yin 2018). How we selected our cases, gathered and analysed the data is described in the research process below (see Fig. 1 for an overview).

Firstly, we defined the case selection strategy. The companies were chosen according to a purposeful sampling strategy, used for identifying information-rich cases as an effective use of limited resources (Patton 2002). Thus, we were able to pinpoint informants that are experienced with the phenomenon of interest (Elo et al. 2014, p. 4) and willing to communicate practices in a reflective manner (Bernard 2002).

The first two of the following criteria generated a pool of organisations that increased our chances of being able to swiftly identify cases that matched the third criterion – our main area of interest:

- *Medium-sized enterprises*: Chap. 2.1 showed that SMEs tend to adopt agile frameworks quicker than larger firms. The Northern American criteria define business with fewer than 500 employees as SME (Small Business Administration 2020).
- *Focus on IT services*: Chap. 2.3 found the IT sector likely to include first movers towards business agility.
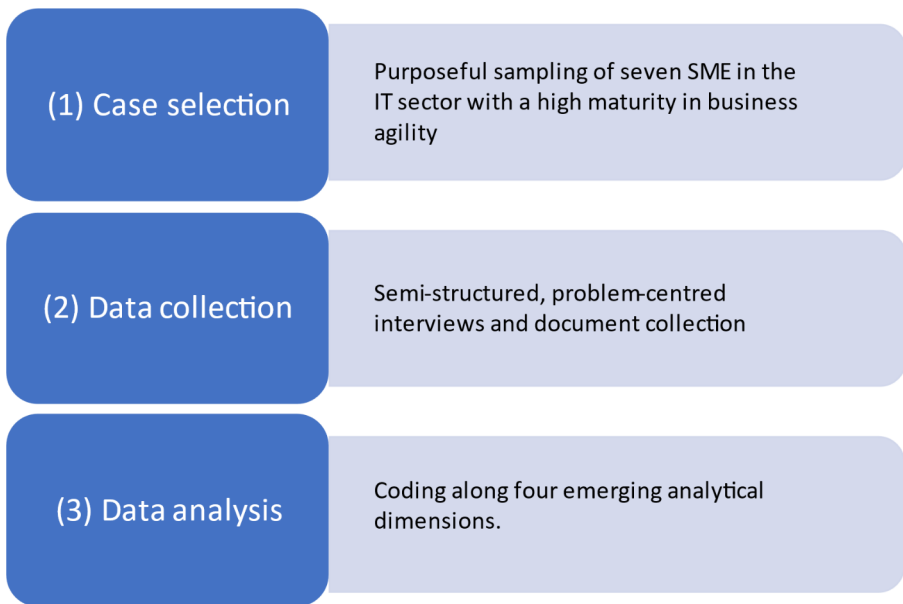
(1) Case selection	Purposeful sampling of seven SME in the IT sector with a high maturity in business agility
(2) Data collection	Semi-structured, problem-centred interviews and document collection
(3) Data analysis	Coding along four emerging analytical dimensions.

Fig. 1 Overview of the research design

- *State of agility*: focus on mature Business Agilists (according to Werder and Maedche's 2018, see Chap. 2.1).

Due to the chosen spotlight on Swiss IT SMEs and the tight-knit community within that field, identifying potential cases was relatively straightforward. Companies on a long-list were screened via openly accessible information, including active participation in agile communities (e.g. conferences or publications). Next, we approached promising organisations on the remaining short-list directly, disclosed our research interest and subsequently determined their suitability in informal conversations. Albeit being developed for larger organisations, we found the characteristics of mature organisational agility, as summarised by Aghina et al. (2020) (see Chap. 2.1.), to be useful in this process.

Within the scope of this research, we thus selected seven organisations as illuminative or extreme cases (Yin 2018; Eisenhardt and Graebner 2007; Ongwuegbuzie and Leech 2007, p. 113). As mature Business Agilists and reflective practitioners, they are pushing the boundaries of people management by applying agile principles to HR and leadership – showing how it "could be" (Suri 2011, 67). The rareness of such cases makes them suitable for explorative endeavours (Seawright and Gerring 2008, p. 301–302). As our case companies are engaged in the same professional communities, our sampling strategy minimises variation and aims at replicating findings within (Eisenhardt and Graebner 2007; Guba and Lincoln 1989). At the same time, we maximise case variation through contrary replication (Guba and Lincoln 1989). We do so in including cases with different motives for pursuing business agility, thus illuminating constructs and identifying relationships concerning the phenomenon under investigation (Ridder 2017).

Table 1 Within-case analysis of companies and drivers for agile transformation

Firm A	Employees Switzerland: 400/ Global: 0, Turnover € 99m, Founded 1974
Sector/firm profile	IT Services/ IT solutions for banking
Core drivers for starting the transition to Agility	cultural change, new employer brand: flexible/new work, managing the new workforce, fostering self-organisation/autonomy/entrepreneurship
Agility Profile	Learned agilist
Methods	SAFE Framework, Scrum, Kodo-Cards
Emergent agile HR practices	Career model with focus on specialist careers and agile roles, new generation as recruitment and personnel development topic, employer branding
Data Sources	6 semi-structured interviews, documents
Interviewees	Head of Development and member of the Executive Board (1), Department Manager Front Suite (1), Head of Department Financing (1), Release Train Engineer (2), Scrum Master (1)

Firm B	Employees Switzerland: 206 / Global: 94, Turnover € 37m, Founded 1995
Sector/firm profile	IT Services/Software Development/Consulting & Training
Core drivers for starting the transition to Agility	cultural change, new employer brand: flexible work conditions, managing the new workforce, change in leadership
Agility Profile	Learned agilist
Methods	Scrum, instruments that increase transparency/communication across departmental boundaries
Emergent agile HR practices	new generation as recruitment and personnel development topic, employer branding, set up HR services for agile organisational units, flexible work, fostering self-organisation, fostering individual learning & development
Data Sources	3 semi-structured interviews, documents
Interviewees	Chief HR & Operating Officer/Member of the Executive Board (1), Marketing Manager (1), Team Leader (1)

Firm C	Employees Switzerland: 200 / Global: 150, Turnover € 75m, Founded 1983
Sector/firm profile	IT Services/Software Development/Consulting & Training
Core drivers for starting the transition to Agility	Customer orientation, cultural change, new employer brand, change in leadership
Agility Profile	Learned agilist
Methods	Scrum, Kanban, "Spotify Model" (Gilden), fostering self-organisation/autonomy
Emergent agile HR practices	Recruitment via employee networks, retention management through new psychological contracts (more self-organisation/responsibility), specialist careers, new employer brand: flexible work
Data Sources	3 semi-structured interviews, documents
Interviewees	Head HR (1), Head Business Development and member of the Executive Board (1), Team Leader (1)

Firm D	Employees Switzerland: 150 / Global: 0, Turnover € 18m, Founded 2010
Sector/firm profile	IT Services/Software Development/Consulting
Core drivers for starting the transition to Agility	Cultural change, empowerment, customer orientation, speed, entrepreneurship
Agility Profile	Entrepreneurial & values-driven agilist
Methods	Holacracy, Scrum, "Spotify Model" (Gilden), agile values management
Emergent agile HR practices	New employer branding (i.e. flexible work, entrepreneurship, intrinsic motivation), team-led recruiting, agile values-fit, self-driven employee development, HR specialists as coaches and experts, role-based and distributed HR
Data Sources	4 semi-structured interviews, documents
Interviewees	Co-Founder/Member of the Board (3), HR specialist (1)

Firm E	Employees Switzerland: 240 / Global: 260, Turnover € 60m, Founded 1995
Sector/firm profile	IT Services/Software Development
Core drivers for starting the transition to Agility	Cultural change, speed
Agility Profile	Learned agilist
Methods	Scrum, agile values management
Emergent agile HR practices	Managing the new workforce, retention management through new psychological contracts (more self-organisation/ responsibility), participation, employee profit sharing
Data Sources	3 semi-structured interviews, documents
Interviewees	Co-Founder/Member of the Board (1), Head HR (1), Team Leader (1)

Firm F	Employees Switzerland: 300 / Global: 0, Turnover € 49m, Founded 1984
Sector/firm profile	IT Services/Software Development
Core drivers for starting the transition to Agility	Alignment with core-values, long tradition of flat hierarchy and autonomous teams
Agility Profile	Entrepreneurial & values-driven agilist
Methods	Scrum, Kanban, delegated authority
Emergent agile HR practices	Increasingly decentralised HR role by empowering self-organised, autonomous teams, leaders as enablers and facilitators, agile values-fit for recruitment
Data Sources	3 semi-structured interviews, documents
Interviewees	CEO (1), Head HR (1), Team Leader (1)

Firm G	Employees Switzerland: 150 / Global: 250, Turnover € 34m, Founded 1996
Sector/firm profile	IT Services/Software Development/ Consulting
Core drivers for starting the transition to Agility	Coping with complexity in a fast-paced environment, speed, removing bottlenecks that limit decision-making
Agility Profile	Entrepreneurial & values-driven agilist
Methods	Holacracy, delegated authority
Emergent agile HR practices	New employer branding (i.e. flexible work, entrepreneurship, intrinsic motivation), cultural and values fit for recruiting, role-based approach, and distributed HR function (close to subject matter), emphasis on cultural onboarding, specialist careers
Data Sources	3 semi-structured interviews, documents
Interviewees	Head HR (1), Senior Leader (1), HR Specialist (1)

Secondly, the study relies on data gathered between January 2017 and February 2019, in no particular order. With interviews being our main data source, we interviewed a total of 27 board members, HR specialists and leaders who were willing to share insight into their organisational development and people management practices. Within each organisation, at least two different perspectives were obtained: top management, and team leader or expert. The interviews can be characterised as problem-centred (Witzel 2000). They followed semi-structured, open-ended guidelines and took the form of guided conversations rather than structured inquiry (Groeben 1990). The communication strategies included a conversational entry, general and specific prompting, and ad hoc questions (Flick 2018). Interviewees were provided with brief information about the research interest two weeks prior to the interview date. The interviews generally lasted 60–90 min, were audio-recorded and subsequently transcribed – resulting in over 360 pages of text. Additionally, we collected documents (e.g. presentations, guidelines, programmes) from each company. According to Yin (2018), triangulation of data is important to strengthen validity. A detailed overview of our sample can be found in Table 1, with names excluded to ensure confidentiality.

Thirdly, the data analysis started with a "first cycle coding" procedure (Miles et al. 2020) after conducting the first interview. Subsequently, the key factors found in all single cases were marked with a series of codes. The simultaneous collection and preliminary analysis of data helped us to recognise whether data saturation was achievable within the chosen sample (Elo et al. 2014, p. 5; Francis et al. 2009 p. 1230).

Table 2 Coding and categories

Codes allocated in *first cycle coding*		Category added in *second cycle coding*
Codes allocated across all cases (i.e. included in further analysis)	**Codes allocated to single cases (i.e. dropped in further analysis)**	
Business agility as a commitment for the whole organisation (i.e. critical mass)	Leaving bureaucracy and being weighed down by a process-heavy organisation behind	**Motives and drivers to pursue business agility**
Openness, transparency (organisational and personal transparency)	Seeing yourself as a beacon or missionary for business agility	
Trust, community, connectedness as core values		
Learning and error culture, experimenting and (rapid) prototyping, learning by making mistakes		
New self-concept leadership (vs. management), power-shift to employees / intrapreneurship, flat hierarchies / alternative power structures	Hybrid structures (e.g. hierarchical and agile principles side-by-side) results in lack of cross-functional collaboration	**Challenges of organising business agility**
Need for self-initiative and motivation for taking over responsibility (for all employees)		
Empowerment, autonomy (vs. alignment), delegated authority (and treating people accordingly), participation		
HR as coaches that empower others to take over people roles / distributed or decentralised HR function / HR in cross-functional teams	Team-led or network-based recruiting with a focus on value-fit	**Emerging HR roles and practices**
Business agility as a part of the employer branding	Employee retention (in particular of experienced employees)	
Strengthening self-learning, community-driven learning, continuous learning	Strengthening self-organised teams	
Job-crafting, mixing professional and personal development, non-linear careers, boundary management	Team performance, goal-orientation, performance reviews	
Suitability of employees to work in such a setting (e.g. fear of responsibility, overwhelmed), recruiting challenges	Temptation to build a new process-heavy organisation if agile frameworks are implemented too rigidly	**Tensions during the agilisation of HR work**
Fear of losing control and chaos (also due to lack of discipline or goal-orientation)	Interaction with non-agile customers and non-agile labour market	

Upon completion of all data collection, the initial codes were grouped into categories (i.e. collection of codes of similar content) in a "second cycle coding" procedure (Miles et al. 2020) to make them more usable. These categories were grouped along four analytical dimensions: (1) motives to pursue business agility (Chap. 4.1), (2) challenges of organising agility (Chap. 4.2), (3) emerging HR roles and practices, and (4) emerging tensions during the agilisation of HR work (Chap. 4.3). In each dimension, we first looked for patterns in individual case data, before comparing them in a cross-case analysis (Cresswell 2007; Yin 2018). While the within-case analysis was performed using MAXQDA, the cross-case analysis was based on a tabular analysis by hand. Throughout this process, we used other sources of data to verify whether our observations could be grounded. Themes that could not be confirmed across all seven companies were dropped from further analysis. This form of content analysis allowed us to see and interpret the data within its context (Kohlbacher 2006). Thus, the finding of patterns and commonalities was the main aim of our analysis. Table 2 shows the initial codes, how they are grouped into categories and also indicates codes that were not pursued further.

At this stage of the analysis, we "enfolded" (Eisenhardt 1989) literature to link the identified challenges to theoretical and practical implications (Chaps. 4 and 5), in an endeavour to go beyond a mere description of the emergent practice.

4 Empirical findings

After proposing our *Business Agilist* typology, we summarise general challenges of managing agile transformation, HR roles and practices. While doing so, we bear in mind that any observation can be only preliminary in the study of this recent phenomenon – which is why Chap. 5 includes a further research outlook. Finally, this chapter outlines tensions that surface in the wake of agile HR.

4.1 Business agility typology: identifying patterns for pursuing agility

Albeit being considered *Business Agilists* and exhibiting mutual challenges, the cases show unique agility drivers. These cultural patterns may be considered when creating frameworks for agile HR.

4.1.1 Learners: from agile methods to the ultimate agile mindset

Learners include companies A, B, C and E, who consciously acquired agile methods and tools and are an active part of the agile community. Learners strive for continuous improvement and broad implementation of agile principles. Their enthusiasm is grounded in anti-hierarchy, anti-status thinking and an anti-bureaucracy movement – rooted in agile values. The agile transformation is driven by learning agile methods and exchanging experiences. Agility may be understood more as a management trend rather than a strategic response to complex challenges (Teece et al. 2016). The focus is on maximising customer centricity and, above all, being attractive to a new generation of employees (i.e. *generation Y*). Learners participate intensively in publications and forums, wanting to stay avant-garde. Community-building is at the core of HR practices, which includes helping employees to find their voice internally (e.g. for close collaboration, continuous reflection and improvement) and externally (e.g. for networking and (employer) branding purposes).

4.1.2 Entrepreneurs: agile frameworks strengthen autonomy and accountability

For *Entrepreneurs* (company D), agility is a means of promoting entrepreneurship by empowering individuals – essentially turning them into a swarm of CEOs. Distributed and entrepreneurial management qualities directly tune into the dynamic capabilities of an organisation (Teece et al. 2016; Meyer et al. 2017). Being an active part of the agile community is not a driver, which makes the Entrepreneur much less ideological. After all, the entrepreneurial vision follows economic reasons. As a manager from company D elaborates: "we approached it very simple. We didn't want to turn it into a religious debate". Continuous innovation through collaboration and self-reliance ensures the company's market position. The HR focus lies on supporting employees in dealing with extreme transparency, taking over responsibility and conflict management. In recruitment, attention is paid to resilience, independence, and initiative, while agility is also used to convey employer branding.

4.1.3 Values-driven: purpose and agile values aligned

Values-driven companies F and G are interested in ideological, human-centred aspects, rather than perfecting agile methods. Mindful of the expectations of a new generation of employees, they prioritise flexibility, participation, co-creation, freedom, fairness, and respect. The shared sense of purpose and a network of empowered teams (Aghina et al. 2020) are at the core of these organisations. A manager from company G explains this new meaning of flexibility: " Gen Y, they're different… As a Swiss or Central European, I can quit today, go abroad for 6 months, come back and if I'm reasonably well educated, there's a 99% chance I'll have a good job again. We also have more part-time employment, where you pursue other passions". The agile mindset coincides with these values, creating a symbiosis between these companies' own value orientation and the agile movement. Ensuring a value-fit is an important aspect of their recruitment process, as well as creating a human-centric work environment that lives up to their declared values.

4.2 Organising Business agility: identifying patterns of challenges

From a systems theory perspective, the challenges these organisations face can be linked to replacing hierarchical structures with self-organisation – opening up opportunities for HR agents to co-create possible solutions, as explained in Chap. 4.3.

4.2.1 Challenge 1: shared commitment

The importance of involving all organisational layers was present across all interviews: current decision-makers must support the journey towards agility and demand that *everyone* takes part. Selective implementation amplifies tensions and contradicts the need for alignment via value and principles. This *all-or-nothing attitude* is reflected by extensive training in order to establish a common language: "If you want to make that transformation, you must have a commitment across the board" (C, I1).

4.2.2 Challenge 2: committing to transparency and openness

Transparency and openness represent cornerstones of implementing business agility, as reflected in the following statement: "what must be certain is an openness to new things. And with it, interest, and willingness to learn" (B, I3). *On an individual level*, transparency means communicating openly and being authentic. *On an organisational level*, transparency manifests in an error culture of sharing mistakes and learnings. Transparency also means forgoing information-asymmetry – a crucial aspect of self-organisation (Parker et al. 2015). Individuals can only make decisions in the company's interest with access to all relevant information, as the head of HR of company F explains. On a *normative level*, transparency becomes a "weapon" that disarms individuals and empowers the collective. Consequently, transparency is a condition for employees to become co-entrepreneurs (Teece 2017).

4.2.3 Challenge 3: building (trusting) communities

All interviewees stressed the importance of employees proactively networking and contributing to the development of the company. In this context, the desired culture is often compared to a family. This entails building trusting relationships, a prerequisite to self-organised teams (Polley and Ribbens 1998): "Trust. I believe this is the basis for agility. Because in agility, you try to get rid of as much overhead as possible" (E, I1). Employees should not compete for status, but instead support each other in making an impact. As authority shifts, individuals must also be coached and advised in exercising their power.

4.2.4 Challenge 4: shaping fast yet positive changes

Establishing a strong learning culture is linked to embracing failure as a part of the process, while rapid prototyping fosters problem-solving and innovation. This pragmatic approach is an anti-thesis to bureaucracy and status thinking. For a senior manager at company G, experimenting is based around the criterion of "safe enough to try". Following continuous improvement necessitates a high degree of self-reflection and vulnerability – a dimension of agile culture that Rebentisch et al. (2018) omit.

### 4.3 Overcoming challenges: incorporating agile capabilities into HR capabilities

As another common theme, tasks and topics commonly associated with HR are realised as a shared responsibility between employees, leaders, and HR specialists. In short, distributed HR capabilities contribute to creating the right cultural environment for mechanisms such as self-organisation and shared decision-making to come into play.

4.3.1 Agile HR as distributed capability and shared responsibility

The incorporation of agile capabilities into HR work takes place in a distributed way, in a *triangle of responsibility* between employee, leader, and HR specialist (see Fig. 2). The term HR specialist, in our understanding, includes organisational development competencies, as these two fields of expertise seem inextricably linked in all companies studied. Compared to previous models (Appelbaum et al. 2017) responsibility largely shifts to individual employees: while leaders and HR specialists might offer to coach or moderate, it is ultimately up to every organisational member to take initiative. Against this background, we suggest a terminology change from HR to *(agile) people management* (PM) – reflecting the more comprehensive, integrative and collaborative approach to distributed HR work.

4.3.1.1 Role attribution of employees: intrapreneurs With a high level of responsibility for shaping their role(s) and individual development, employees are required to communicate and engage with feedback openly and constructively. An interviewee from company B mentions: "the co-responsibility of employees is a crucial aspect" (B, I1). Individuals need to be actively supported in developing their decision-making, self-reflection and communication skills.
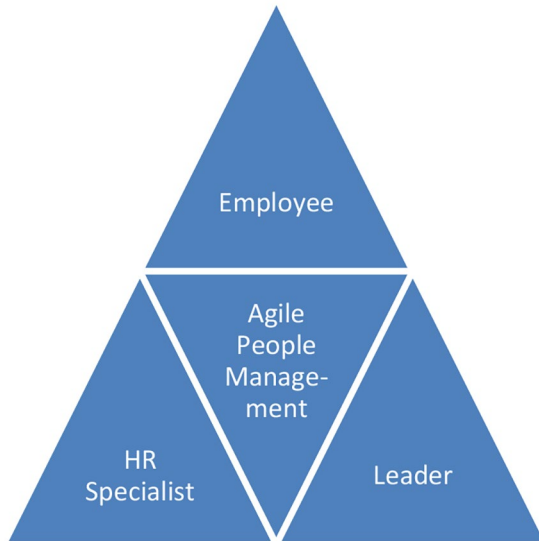
4.3.1.2 Role attribution of leaders: on-demand coaches The image of the heroic leader is replaced with role-based leadership-systems. Self-attribution of leadership includes being a coach, enabler, facilitator, consultant – all in line with servant leadership, a concept that upends traditional power relationships sees leaders in supporting roles. Many organisations report this role-shift poses a major challenge for leaders who were socialised differently. Leadership role-holders contribute to individual and collective self-organisation, aiming to generate fewer interfaces and enable fast decision-making close to the expertise. Above all, this requires relationships at eye level, as a founder of company D stresses. A manager from company A states that "it is a matter of creating a framework. Within in, you're simply there for questions" (A, I3). This conception exceeds the pre-existing definitions for agile leadership as a mere tool for accelerating decision-making (Doz and Kosonen 2008).

4.3.1.3 Role attribution of HR specialists: expert knowledge owners and networkers In agile organisations, HR specialists are expected to equally coach all organisational members – a stark contrast to HR business partners that solely serve line management (Ulrich 1997). An HR specialist in company D speaks of offering a pool of expertise that the organisation can tap into, without forcing it. In line with their diverse customers, this new multifaceted role might include knowledge management, stages along the employee lifecycle, community-building or organisational development. These aspects centre around nourishing a culture of learning and sharing, with an error culture that reframes mistakes as learning opportunities. Routine tasks are sought to be automatised and integrated into a seamless employee experience.

4.3.2 Critical HR capabilities for agile organisations

As a next step, we describe *key approaches of how companies overcome agile management challenges* in the responsibility triangle introduced above.

4.3.2.1 Recruiting and employer branding In their proactive employer branding, *agile* stands for a modern working environment and plays a vital part in finding employees with the best cultural fit in a dried-up labour market. Company D, for example, calls itself "a closed group" interested in the values of potential joiners. Positively connoted agile values such as personal responsibility, autonomy and participation are marketed to candidates (matching new employee expectations, see Chap. 1), whereas attributes such as discipline and reliability are less highlighted – presenting the agile culture (Rebentisch et al. 2018) in a starkly positive light. Hiring needs and recruiting decisions are often established collectively.

4.3.2.2 Agile (self-)learning These organisations fully embrace that their agility ultimately depends on the ability of their members to transform and innovate (Charbonnier-Voirin 2011). Handing over budget and responsibility for individual development allows individuals to tailor their learning to their current needs and interests, for instance via internal academies, ideation hubs or other learning communities. A manager from company A explains that "you have to get away from traditional HR development concepts, you have to move in the direction of self-learning" (A, I3). These approaches follow the maxim that the autonomy of self-organising social systems cannot be orchestrated (Malik and Probst 1984; Luhmann 19956) – but that its members can be supported in navigating uncertainty, sharing insight and community-building.

4.3.2.3 Agile people development and career planning These organisations depend on their *knowledge workers* to continuously expand their expertise. Accordingly, they have a strong interest in facilitating alternative career paths that allow individuals to develop tomorrow's skills and follow new opportunities). Instead of rigid, pre-defined career paths, agile organisations understand careers as individual, strength- and interest-based, self-driven and everchanging portfolios of roles. Accordingly, companies implement flexible working conditions (e.g. unpaid leave, remote or part-time work). Whereas job labels might be very limited in such organisations, the opportunity for individual skill development is abundant.

4.3.3 Tensions when strengthening agile people management

4.3.3.1 Fear of losing control Whereas line management legitimises itself through hierarchy, agile leadership is more fluid and leading by virtue of competence. Being stripped off their title, many former line managers fear to become irrelevant, failing to see the opportunities suddenly available (e.g. new tasks or coaching roles).

4.3.3.2 Overwhelmed employees Especially in early stages of a transformation, employees can feel rather overwhelmed. While not uncommon for any change process, this might be amplified by the new maxim of self-organisation and increased decision-making capacity. The significant psychological adaption presupposes a high degree of self-reflection. Some employees leave the organisation as a result, underlining the importance of recruiting for cultural fit. A founder of company D highlights that some individuals need to be supported in learning how to navigate self-organisation, without changing the system itself – respecting its autonomy. The new career paradigm can also be frustrating, as many organisations are only starting to explore the systematics of organising and recognising alternative career paths.

4.3.3.3 **In search of the human factor** In an agile context, individuals need to constantly weigh their decisions against values and principles, instead of being able to follow a simple set of rules. Somewhat paradox, a high degree of self-organisation hence requires a high degree of alignment to ensure coherence. A senior manager in company G acknowledges that many current agile management systems omit human aspects, and that it is therefore vital to embedded them in the culture and leadership system, regardless of the chosen framework.

5 Implications and conclusions

While looking at agile organisations through a systems theory lens revealed beneficial cultural and structural interventions, there were no implications for the development of agile HR capabilities. Literature on existing agile management approaches discusses the strategic and team level, yet again largely overlooks the role of HR. In order to close this gap, key management challenges across different pioneering Business Agilists were condensed, and critical HR capabilities across all types were described and interpreted. The theoretical and practical implications are now summarised below.

5.1 Theoretical implications

5.1.1 A proposed typology for business agilists

Despite our focus on common patterns in first-movers, we noticed slight nuances in their manifestation of agile HR capabilities. The proposed typology offers the opportunity to expand the emerging theory beyond the mere labelling of organisations as *agile*. *Learners* are highly invested in creating a new HR narrative that is compatible with their agile vocabulary, essentially developing new roles around people development while actively unlearning hierarchical behaviours. *Entrepreneurs* adopt a radical stance, subordinating all decisions to the maxim of entrepreneurship. HR specialist roles often vanish completely, with every organisational member emerging as a self-organising unit. *Value-driven* organisations are predominantly interested in cultural development. Their focus lies on employee wellbeing and motivation, on creating a supportive environment where people feel valued. Removing the HR function is not a priority, yet there is often a noticeable shift towards role-based and distributed approaches.

5.1.2 HR as a (radical) distributed practice

Practice has shown that business agility simultaneously challenges on a *team management level* and a *strategic management level*, requiring all organisational members to engage with agile values and principles – a crucial task that can only be fulfilled by strengthening HR capabilities. The development of these HR capabilities takes place as a collective knowledge development process (Laloux 2014; Maximini 2018). An important step is the decentralisation of HR work from functional special-

ists to teams, employees, leaders, and tech solutions alike. One might therefore speak of an *HR sharing approach*. HR is no longer a strategic servant, but – *as a shared practice* – an inherent part of organisational, cultural and innovation development (Worley and Pillans 2019). By supporting and scaling the skills development needed to sense and seize opportunities, HR capabilities directly contribute to ensuring continuous transformation in the organisation (Teece et al. 2016; see Chap. 2.3).

5.1.3 Network and role-based approach to HR

Agile organisations often choose a role-based approach, where self-reliant individuals are encouraged to curate their own path of professional and personal development. This stresses the *need for a re-definition of occupational profiles and role descriptions*. Even the term HR *specialist* may be critically reviewed in the transition towards a more meritocratic or distributed approach. Furthermore, for many SME, the creation of dedicated in-house roles might not prove feasible.

5.1.4 Dynamic (self-)learning processes over HR programmes

Capable individuals, with their willingness and ability to learn, are at the centre of organisational development. HR capabilities may support them in this endeavour in a flexible way. The strategic role of HR (Brockbank and Ulrich 2009; Ulrich 1997) gives way to a *pragmatic*, development-focused role – in line with a *renaissance of the concept of organisational learning* (Argyris and Schön 1978). While HR expertise is only *involved when needed*, daily HR work is done by highly autonomous teams, empowered individuals, and servant leaders (Luhmann 1995; Probst 1987). Providing direct support instead of being solely programmatic, *HR is no longer alienated from the business.*

5.2 Practical implications

The cases studied show how Business Agilists may fulfil the threefold purpose of agile HR by (1) contributing to the structural and cultural conditions around self-organisation, (2) supporting continuous individual and collective learning, and (3) fostering intra- and entrepreneurial behaviour. In short, there is no best-practice approach to "HR for Agile" (McMackin and Heffernan 2020), and every organisation is urged to *co-create context-specific HR practices*. However, to overcome the identified challenges, there are crucial elements all organisations may benefit from incorporating.

5.2.1 Transparency as a precondition in the agility-stability paradox

It soon becomes evident that many of the tensions correspond to what is known as the *stability-agility paradox* (Smith and Lewis 2011). Constantly re-calibrating itself to current needs, an agile organisation needs to continuously balance exploring with exploitation in a highly dynamic environment, rendering over-simplified *cookbook recipes* impossible. Considering this, *transparency* becomes even more important,

also in the sense of shared values, goals and intensions and fostering leadership skills in all members of the organisations (Moravec 1999). HR work can only be distributed across the organisation if information is shared openly and thus allows decision-making in line with company interests (Laanti et al. 2011).

5.2.2 Integrating the human factor into the system

When agile organisations are overly focused on structure or methods (Fernandez and Fernandez 2008), they fail to include the human nature into their system – for instance relying completely on employee proactivity. Business Agilists benefit from developing *human-centric concepts* that support individuals in unleashing their full potential. These concepts are characterised by individuals experimenting with role(s) based on their competencies and interest in taking over responsibility in a certain area. Pairing support with granting autonomy in turn acts as an incentive for individuals to show initiative and ultimately behave as co-entrepreneurs.

5.2.3 Clarifying roles and considering network and role-based approaches

In line with the need for a re-definition of HR roles, there are many opportunities for organisations to experiment with distributing HR work. HR specialists might take on roles *involved in client work* or be a part of an *inter-organisational people management ecosystem*, alongside their in-house HR accountabilities. In doing so, they not only broaden their own competences, but gain insights into customer needs and strengthen relationships. Especially for SMEs, this might be a way to mitigate the financial pressure of having in-house HR expertise.

5.2.4 Integrating HR in servant leadership practices

The maxim of self-reliance may amplify interpersonal conflict. Therefore, HR capabilities must adjust to dealing with contradiction, responsibility and independence. This aligns with established change management role in terms around resistance to change (Senge et al. 1999). The co-development of HR capabilities in the *HR responsibility triangle* also goes together with the idea of servant leadership, where leaders enable individuals and teams to navigate autonomy instead of micromanaging them (Parker et al. 2015, p. 119). Leadership becomes a major contributing factor to creating an organisation where individuals are seen as trustworthy, resourceful and intrinsically motivated (Appelbaum et al. 2017, p. 12). As a result, leadership roles may incorporate many accountabilities traditionally associated with HR.

5.3 Conclusions

This study addresses two gaps identified in the existing literature: *firstly*, the lack of implications for developing agile HR capabilities from a systemic-holistic perspective, and *secondly*, the lack of HR concepts in the emerging agile management literature. The framing of *distributed HR* as a relevant dimension of strengthening the dynamic capabilities within agile organisations is a major contribution of this paper.

Following this idea might lead to an establishment of *people management ecosystems* (Denning 2015), alongside empowering individuals to embrace own HR capabilities and integrating HR into *servant management* practices. This servant attitude does not render *agile HR* a mere service provider, but instead a vital contributor to organisational development – a force of entrepreneurship and creativity. Furthermore, the strategic role of HR in implementing business agility strategies clearly revolves around *supporting learning processes* at every organisational level.

6 Limitations and future research

As outlined in the theoretical background, the IT sector is often at the forefront of agile transformation, which led to our purposeful case selection. The application of the study's results to other sectors therefore may be investigated in further research. The same applies for countries that are not comparable to the economic and cultural parameters of Switzerland. The transferability of the results is therefore limited. Furthermore, we focused on SME ranging from 150 to 300 employees. Considering SME's scarcity of management resources, their often people-centric business models, reliance on leaders as well as often tacit HR knowledge (Klaas et al. 2012), it can be concluded that the results would have to be verified for other organisation sizes. However, emerging results, such as the potential of HR capabilities in assisting community-building within the organisation, might be just as interesting for larger organisations. The relatively small number of cases in this explorative study might also be expanded in a follow-up study, which could then provide the basis for a differentiated assignment of HR capabilities to the proposed Business Agility types. Moreover, amplifying the perspective of employees may prove fruitful in further research, quasi as recipients of the agile initiatives. Our analysis also excludes topics that did not show a pattern, as we were interested in typical issues relevant to all the companies studied in our search for critical capabilities.

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