

Agile4ALL – An Agile Human Resources Pilot Implementation in an Algarve Tourism SME

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ABSTRACT

This human resources management project was carried out by the University of the Algarve to apply an innovative vision of agile practices to the hospitality and tourism sector. Recently, agile human resources have attracted increasing interest among professionals. Starting with the Agile Manifesto, this approach was initially implemented in the information technology sector to combine processes and tools, such as Lean, Kanban and Scrum, to improve organisational performance. Agile companies are more informal and use open communication, as well as showing greater motivation and productivity. However, the transition to agile operations is disruptive. Some common failures are a sense of culture shock and a lack of support for and knowledge about agile practices, which require an appropriate communication strategy that involves all stakeholders in a continuous feedback loop. The project pilot was implemented in a small and medium-sized company in the Algarve tourism sector. The goal was to analyse the feasibility of transforming a traditional organisation into an agile one, with human resources employees and management acting as the main promoters of this process. The results confirm that an agile transformation is possible, but seasonality factors and the participants' availability must be considered for this process to be successful. A set of follow-up studies is proposed for future research.

KEYWORDS

People Management, Strategic Human Resources (HR), Agile, Tourism Small and Medium-sized Enterprise (SME).

ARTICLE HISTORY

Received 14 April 2025 Accepted 31 January 2026

1. Introduction

Agile human resources (HR) practices are attracting increasing interest from HR professionals because greater organisational agility is needed to deal with uncertain environments (McMackin & Heffernan, 2021). The first agile methodologies were presented by the Agile Manifesto, which was written by software developers (Beck et al., 2001) seeking more flexible, adaptive approaches to their work. This manifesto highlights values and principles that prioritise individuals, interactions, functional solutions and customer collaboration over static or rigid processes and tools.

Early adopters of the agile approach focused mainly on the principles of iterative development, continuous feedback and adaptability, which facilitate better collaboration and faster delivery. Lean, Kanban and Scrum have since become the most popular tools for agile teams. After the initial success of these methods in software development, they expanded beyond their software roots (Google TechTalks, 2009) into varied industries such as finance, healthcare and marketing.

Non-technical teams have also adopted agile practices to improve their collaboration, response to changing markets and customer satisfaction (Rigby, 2021), especially as fast-paced innovation has turned into a strategic imperative for most companies and thus become high priority. To achieve this goal, companies observed trends in Silicon Valley and software companies and emulated their agile project management (Cappelli & Tavis, 2018). In the 2010s, new approaches emerged (e.g. the Scalable Agile Framework, Large-Scale Scrum and Disciplined Agile) to provide guidance on how to apply agile principles to extremely complex company-wide projects (Leffingwell, 2011).

During this period, organisations also realised that success was best achieved by aligning agile principles with their cultures. Transparency, collaboration and continuous improvement became fundamental values, promoting an environment conducive to agile practices (Dikert et al., 2016). This trend gave birth to movements such as the Agile HR Manifesto – a group of HR professionals who seek to promote the agile philosophy within organisations (Agile HR Manifesto, 2021).

The present research comprised the final phase of a master's-level study, namely, the implementation of a pilot project in a small and medium-sized enterprise (SME) in the Algarve tourism sector. The goal was to answer the following question: To what extent is agile HR transformation viable in SMEs in the hospitality and tourism (H&T) sector?

To this end, the remaining sections are as follows. The second section contains a literature review addressing four questions:

- What is agile HR?
- How did agile HR develop?
- What are the main advantages and disadvantages of transforming a traditional organisation into an agile one?
- How can HR management help their organisation successfully implement an agile transformation?

The third section describes the methodology, while the fourth section reports the results. The fifth section provides the discussion, and the final section presents the conclusions, limitations and suggestions for future research.

2. Literature Review

The agile approach was first broadly defined by the Agile Manifesto (Agile Manifesto, 2001; Teich & Fadoul, 2013) as a methodology that emphasises continuous process improvement to maximise customer value while minimising waste. Agile practices focus on self-organising and multi-functional teams' iterative growth based on disciplined project management (Jafa et al., 2022). According to the "2022 State of Agile Report," 89% of respondents mentioned that high-performance agile teams have people-centric values, a clearly defined culture, tools and leadership empowerment (State of Agile, 2023, p. 3).

Strategic HR management has developed two distinct ways of looking at agile methods. The first is "HR for agile," which "refers to the design and implementation of HR systems to support [a]gile [practices] in . . . organisation[s]" (McMackin & Heffernan, 2021). The other perspective is "agile HR," which is the adoption

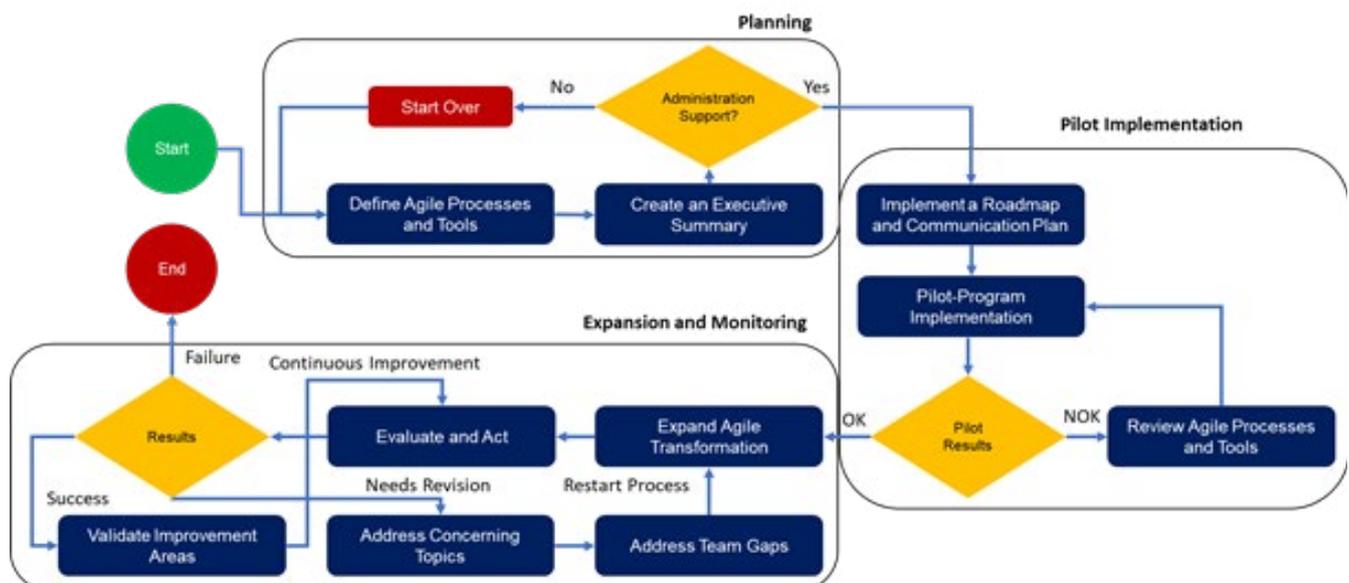
of agile methods and processes as an operational model by HR departments. In agile HR organisations, HR personnel provide the same services as in traditional organisations (e.g. hiring, professional development and performance management), but their practices adjust to ongoing changes in their company's culture and way of working (Gothelf, 2019).

Agile organisations contrast with traditional businesses in terms of project management, as the former tend to be more informal and open in their way of communicating, have more flexible competency management practices and implement mainly non-material incentives. Agile entities also have a flatter organisational structure and a lower ratio of managers to teams (Melnik & Maurer, 2006; McHugh et al., 2013; Zavyalova et al., 2020). According to Serrador and Pinto (2015), companies that implement agile methods additionally report a higher success rate in project execution, greater efficiency and more stakeholder satisfaction. Stakeholders, in this context, are any organisation, project or initiative that have a direct or indirect influence on a company or that are affected by its actions and decisions.

Not all businesses have successfully converted to more agile operations. The main challenges identified are resistance to organisational transformation, corporate culture clashes, absence of proper information technology tools, difficulty implementing agile practices and lack of management support. The "2022 State of Agile Report" further states that respondents' biggest concerns are low leadership buy-in (42%), insufficient knowledge of agile concepts (40%), widespread resistance to change (40%) and insufficient support and/or sponsorship from company managers (39%) (State of Agile, 2023).

Espinosa-Curiel et al. (2018) observe that "the transformation process requires several changes in relationships and interactions between employees." An appropriate employee communication and relationship strategy is, therefore, essential for traditional organisations to change successfully into agile ones. The present study examined the practical results of an agile HR pilot implementation in an H&T SME to determine the extent to which agile HR transformation is viable in SMEs in the H&T sector. To address this question, the available literature about agile HR practices was reviewed and a model developed of the agile HR transformation process (see Figure 1).

Figure 1. Proposed Agile Human Resources Transformation



Source: Own Elaboration (2024)

Figure 1 above shows the four main phases of agile HR transformation: planning, pilot implementation, expansion and monitoring. The literature suggests that HR works best as an "Agile Transformation Department" whose staff members promote agile transformation under the supervision of HR managers and senior executives. This pivotal role ensures a smooth transition and fosters employee engagement in fulfilling six responsibilities (McKinsey, 2021), of which the first is creating a transformation roadmap for

implementing agile strategies across the organisation. The second task is boosting capabilities including hiring and upskilling talent, and the third is serving as culture and change champions within the company. The fourth responsibility is coaching senior leaders, while the fifth is managing the interdependencies required in agile transformation processes. The last is creating and refining best practices while the agile transformation takes place. Various well-known agile transformation use cases are listed in Table 1.

Table 1. Case Studies of Agile Human Resources (HR) Implementation

Business Name	Business Category	State before Agile HR	Migration to Agile HR	Highlights after Agile HR
Banco Bilbao Vizcaya Argentaria (Forcano, 2018)	Private banking	Clear strategic vision but issues with execution New competitors moving faster	Launched pilots in Spain and Latin America (LAT) in 2014	Broke up previous functional units and hierarchies into four distinct groups – “Front,” “Disciplines,” “Solutions Development” and “Employee Experience” – each with its own specialties:
			Combined product and engineering teams in multidisciplinary, co-located teams	Front (10–15%) – business partners offering strategic advice and support
			Produced successful results inspiring implementation in talent and culture (T&C) departments in 2016	Disciplines (10–15%) – small teams defining HR strategy, models, policies, tools and platforms
			Created a pool of people fully dedicated to projects in all T&C units in Spain and LAT	Solutions Development (25–30%) – multidisciplinary HR teams executing projects using Scrum
			Moved 10% of teams to project-based organisations	Employee Experience (40–50%) – teams executing end-to-end processes, delivering value to internal customers.
			By 2017, moved entire team to agile HR in Spain and over 2,000 other employees in 10 countries	Implemented Lean and Kanban principles Created new roles and responsibilities, ceremonies, people management models and communication tools Promoted acceptance of the agile approach across the organisation
Sky (Ballard-Pateman, 2022; Jeffery, 2018)	Media	Slow paced delivery of value Wasted time and resources due to perfectionism Influence of highly paid people’s opinion Siloed HR work	Adopted a “test and learn” approach	Increased support for managers fivefold at a lower cost
			Implemented a three-month pilot for learning and development (L&D) team	Involved 60% of managers in online L&D activities quarterly
			Focused on producing minimum viable products for priority delivery	Offered more opportunities for employee development
			Used agile tools (e.g. Kanban and Scrum)	Built effective sprint teams with equal members and focused on overall goals
			Conducted 1–2 day “swarms” (i.e. meetings) for quick problem resolution	
			Operated in agile “squads” (i.e. teams) with scrum masters and product owners	

Vero (Agile HR Community, 2022a)	Public administration		Built a cohesive leadership team with executive training and coaching	
		Organisation led by strong individual domain experts	Focused workshops on belonging, inclusion and trust-building	Improved leadership team cohesion
		Limited collaboration and inclusion in leadership teams	Co-created change roadmaps and alignment with transformation programmes	Established a culture of trust and respect for those leading changes
		Difficulty adapting to large-scale organisational changes, such as becoming customer-focused and adopting agile ways of working	Facilitated feedback loops between sponsors and programmes	Invested in the long-lasting adoption of agile planning and prioritisation techniques
			Trained leaders in agile techniques such as listening, prioritising and involving others	Effectively resolved tensions and impediments that were hindering progress
			Provided certified agile HR training to the entire TA team	
Thales (Agile HR Community, 2022b)	Security and defence	Technical acquisition (TA) partners working individually, with limited collaboration and communication	Used HR Scrum to help the team set up agile tools and processes, including backlogs, Kanban boards, value flows, estimation and velocity metrics	Increased team performance by 72% within nine months
		Siloed services delivered separately to different business units		Generated higher engagement, belonging and enjoyment at work
		Digitalisation and movement towards agile processes without TA team adopting these practices	Redesigned work processes and scaled their approach with 30+ people	Allowed the HR team to become fully self-managing and proficient in agile processes and tools
				Future-proofed the team to handle growing workloads, such as the surge in remote recruitment during the coronavirus disease-19 pandemic

Source: Own Elaboration (2024)

3. Methodology

3.1 Instruments

Research needs a solid theoretical foundation and carefully thought-out methodology to ensure the collection of the right information and appropriate sample with minimal errors (Gonçalves, 2014). For the present project, a combination of measurement instruments were used, especially qualitative techniques typically associated with unstructured collection methods (Drenth, 1998).

Qualitative research focusses on interpreting phenomena through observation, description, understanding and meaning. The data are gathered without preconceived hypotheses as these are constructed only after observation (Pocinho, 2012). This approach seeks to understand participants' viewpoints by asking guiding questions instead of testing hypotheses statistically, thereby exploring values, beliefs, representations, habits, attitudes and opinions.

The current study relied on open-format interviews, group interviews (i.e. focus groups), brainstorming and audiovisual recordings. These techniques are described in Table 2.

Table 2. Qualitative Research Methodologies Used in Pilot Project

Technique	Description	Advantages	Phases/Characteristics
Open-ended interviews (Íñigo & Mazo, 2008)	Unstructured technique in which the interviewee describes their interpretation of the research subject	Can be conducted in any circumstances to gather in-depth data	1. Definition of research objective 2. Creation of interview guide 3. Selection of participants 4. Execution of interview 5. Analysis of information
Focus groups (Íñigo & Mazo, 2008; Millward, 2000; Ritchie & Lewis, 2003)	Group information collection technique focused on clarifying specific data about a particular group	Can provide a more natural environment for participants and generate data through their interactions	Researcher-led discussion based on questions with variable response formats
Participant-observation (Sackett & Larson, 1990)	Technique used in natural groups in real contexts, with the researchers' unintrusive participation in the study group	Can be effective in restricted groups and for deepening organisational behaviours	Unintrusive participation of researcher
Brainstorming (Sofia José & Simão Neves, 2014)	Meetings used to encourage unrestricted mental activity, originating in 1930s marketing	Can find innovative and creative ideas for solving problems	Specialists gathering relevant information

Source: Own Elaboration (2024)

The project used the above instruments in combination with the OPERA and Metaplan techniques. OPERA (**O**wn Opinion, **P**eer Opinion, **E**xpose, **R**ank and **A**rrange) is a co-creation method that combines systematic thinking with creative problem-solving processes to develop thoughts and suggestions collaboratively in answer to a main question. This technique is typically applied in team meetings, processes (e.g. brainstorming) or workshops, in five phases: (1) individual opinion, (2) pair opinion, (3) facts presentation, (4) idea ranking and (5) idea organisation.

The Metaplan moderation method is a proven, effective way to reach a common understanding in group discussions (Metaplan, 2021). The facilitator provides didactic materials to the participants, such as whiteboards, cardboards and rectangular, oval and round cards (e.g. post-it notes, pins, markers and stickers) that can be combined with co-creation methods (e.g. OPERA). Metaplan is an interactive presentation method in which, during the presentation phase, the facilitator and/or participants have to face the others. At the end of the presentation, the facilitator typically takes a photo of what has been discussed, which serves as a record of the commitments made to specific ideas.

The final tool was the five whys, two hows (5W2H) method, also known as the "curious tool." This technique is a checklist of specific questions that can characterise and/or clarify a particular situation, problem, solution or action plan (Moura, n.d.). The participants answer questions beginning with the following words: what, why, where, when, who, how and how much. The goal is to gather as much information as possible about the activity planned, ranging from more general details, such as what the activity is and why it needs to be carried out, to more specific information, such as the delivery deadline and the person responsible for the activity.

The 5W2H technique can efficiently fulfil varied purposes, namely, reducing idleness, improving communication, increasing the capacity for on-time deliveries, facilitating resource planning and increasing productivity. An effective 5W2H analysis must do three things (5W2H Analysis, 2024), of which the first is to define who is the facilitator of the discussion (i.e. the person responsible for moderating the meeting). The second is to encourage brainstorming, during which the questions are answered in no particular order. The last is to create a descriptive record of the responses at the end of the discussion, organising the topics based on the questions answered using the 5W2H method.

Digital tools were also used to complement the above instruments (i.e. videoconferencing software [e.g. Microsoft Teams]) (Microsoft, 2024) in order to conduct some training remotely and answer questions throughout the pilot programme (e.g. via group chat). Another helpful tool was Open Artificial Intelligence's (AI) Chat Generative Pre-trained Transformer (ChatGPT) (OpenAI, 2024).

The data were manually collected using the qualitative methodologies selected for the pilot project. The authors of this paper were all present in the sessions, contributing to the notes, which were subsequently

compared with the work done by Ballard-Pateman (2022), Capelli and Tavis (2018), Forcano (2018), Jeffery (2018) and Narasimhan et al. (2018). The cited researchers made HR managers primarily responsible for the agile transformation process (Jenkins et al., 2011). The data collected and the notes from the authors of the present article were compared and discussed after the sessions, so only the information that all the authors concurred was valid appears in this paper.

3.2 Procedures

The procedures followed throughout the project were based on the aforementioned instruments and the plan-do-check-action project management approach (Hayes, 2012). The entire process comprised the agile HR transformation shown in Table 3.

Table 3. Agile Human Resources (HR) Transformation Phases

Phase	Description
Determine agile processes and tools	Determine which processes and tools will be used to transform the organisation into an agile entity
Create awareness (State of Agile, 2023)	Create awareness among upper-level management of agile methodology so that they understand the advantages of implementing agile strategies across their organisation (e.g. presenting success stories of agile transformation processes while also speaking openly about the potential challenges of changing an organisation into an agile one and the ways these can be overcome)
Plan roadmap and communication strategy (Bhandari, 2023; Hennink, 2007; Silva et al., 2014)	Plan a roadmap and communication strategy that involves all potential stakeholders in the company (i.e. executives, managers, employees and HR teams) so that the transformation process is clear to all participants, using multiple qualitative data collection methods (e.g. a focus group comprised of pre-selected individuals with similar interests, especially agile processes and tools, who will comprise a small multidisciplinary team that [1] discusses specific issues related to the agile transformation to encourage a range of responses and greater understanding of the participants' attitudes, behaviour, opinions or perceptions and [2] will supervise the agile process, in combination with structured/open interviews or internal polls)
Implement pilot projects (Ballard-Pateman, 2022; Biron et al., 2021; Forcano, 2018; Narasimhan et al., 2018)	Implement the agile processes and tools in small-scale pilot projects across the organisation after the agile transformation roadmap and communication plan are defined and priorities within the organisation are set, using a skunkworks approach to promote experimentation
Evaluate results	Evaluate the results of the pilot projects and discuss them using a Lean/continuous improvement approach: What went well (keep doing), what did not go so well (stop doing) and what needs to be improved?

Source: Own Elaboration (2024)

The above methods enabled an innovative pilot project to be launched, hereafter designated as "Agile-4ALL." This project concentrated on providing SMEs with training and business consultancy in HR management. The main objective was to facilitate continuous improvement within these organisations using an agile HR approach combined with qualitative (e.g. focus groups) and digital tools (e.g. ChatGPT) with the aim of making tangible improvements in team productivity, HR and operational results.

The conceptual framework for Agile4ALL centred around four key points. First, a focus on people generates competitive advantages in constantly changing business environments. Second, proactive responses to change are created through collaborative networks and open communication. Third, continuous improvement is needed in all organisations, and, last, a significant part of organisational problems can be solved internally. In its pilot version, the Agile4ALL programme was divided into five phases (see Table 4).

Table 4. Agile4ALL Project Phases

Phase	Description
1	Raising awareness among the company's management of the advantages of the Agile4ALL programme
2	Defining agile processes and tools, selecting those most suitable for implementation and mapping stakeholders' role in the pilot
3	Applying a communication strategy and roadmap with feedback collected from employees through discussion groups
4	Implementing the pilot by training participants in agile concepts and holding weekly follow-up, monitoring and feedback meetings
5	Evaluating results by collecting and assessing outcomes via questionnaires and interviews that ensure continuous feedback

Source: Own Elaboration (2024)

More extensive research is needed on agile HR practices in H&T SMEs, especially in the Algarve, so this study implemented Agile4ALL in a business with these characteristics and location. The aim was to answer the following research question: To what extent are agile HR transformation programmes viable for SMEs in sectors such as H&T? Table 5 lists the research objectives based on this question.

Table 5. Research Objectives

General Objective	Specific Objectives
Determine the feasibility of implementing an agile human resources (HR) transformation in small and medium-sized enterprises (SMEs), especially in a non-information technology sector such as hospitality and tourism.	<p>Identify, based on the feedback obtained during the project's pilot programme, which practices are positive determinants of agile HR transformations in SMEs.</p> <p>Ascertain, using the same feedback, which practices are negative determinants of SMEs' agile HR transformations.</p> <p>Determine, based on this feedback, whether the agile HR practices used in large companies can be applied by SMEs.</p> <p>Establish the feasibility of an agile reorganisation of a tourism SME by comparing the practices implemented with those reported in the relevant literature.</p>

Source: Own Elaboration (2024)

To this end, multiple SMEs in the Algarve's H&T sector were contacted, and one company was selected as the pilot client. An agreement was reached with the SME to execute the project as described in Figure 2. The programme lasted 12 weeks, with each remote or in-person meeting lasting up to one hour.

Figure 2. Summary of Agile4ALL Activities

Session I (26/04/2024):	Session II (3/05/2024):	Session III (13/05/2024):	Session IV (17/05/2024):	Session V (24/05/2024):	Session VI (31/05/2024):	Session VII (21/06/2024):	Sessions VIII to XII (24/06/2024 to 19/07/2024):
 Presentation of the Agile4ALL programme and its schedule; Approval of the schedule and creation of a focus group; Presentation of the OPERA and Metaplan techniques.	 Workshop on SWOT analysis; Practical activity on SWOT analysis.	 Presentation of SWOT analysis results; Assessment of organisational agility and culture; Proposals for improvement in human resources for the finance department.	 Discussion of organisational agility results; Selection of pilot proposal; Activity with physical Kanban board.	 Discussion on the internal communication process through a focus group (group interview).	 Presentation of the communication proposal; Digital Kanban board training (Microsoft Planner).	 Clarification sessions on the digital Kanban board.	 Monitoring and feedback on the implementation of the digital Kanban board; Feedback on the internal communication proposal.

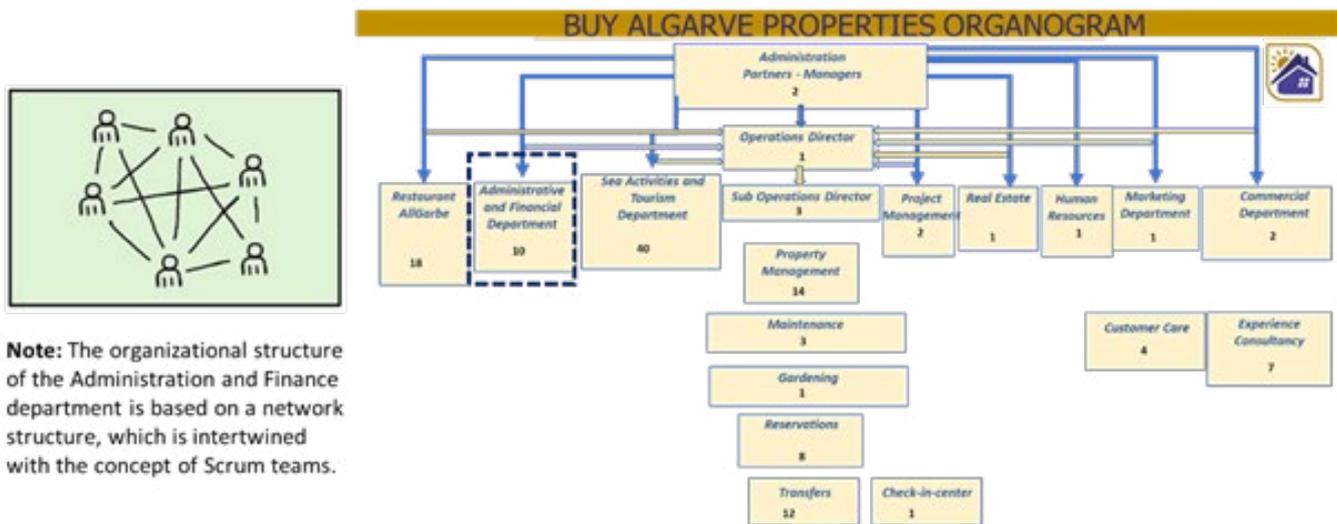
Note: OPERA = Own Opinion, Peer Opinion, Expose, Rank and Arrange; SWOT = strengths, weaknesses, opportunities and threats; HR = human resources.

Source: Own Elaboration (2024)

3.3 Business Description

The company chosen for the pilot was Buy Algarve Properties (BAP), which is part of a multinational tourism corporation founded in 2013 that belongs to the Properties4U group. BAP is a medium-sized business located in the Albufeira Council, with 129 employees as of August 2024. Its business activities fall under the travel agency activities code. The areas of activity are represented by the organogram in Figure 3.

Figure 3. Buy Algarve Properties Organisational Chart



Source: Buy Algarve Properties (2024)

The Agile4ALL programme was described to the BAP administration, after which they agreed that, due to its characteristics, the Administrative and Financial (A&F) Department would be the best team for the pilot. The A&F team’s size was adequate for the programme activities, and the members were also more readily available for the practical implementation.

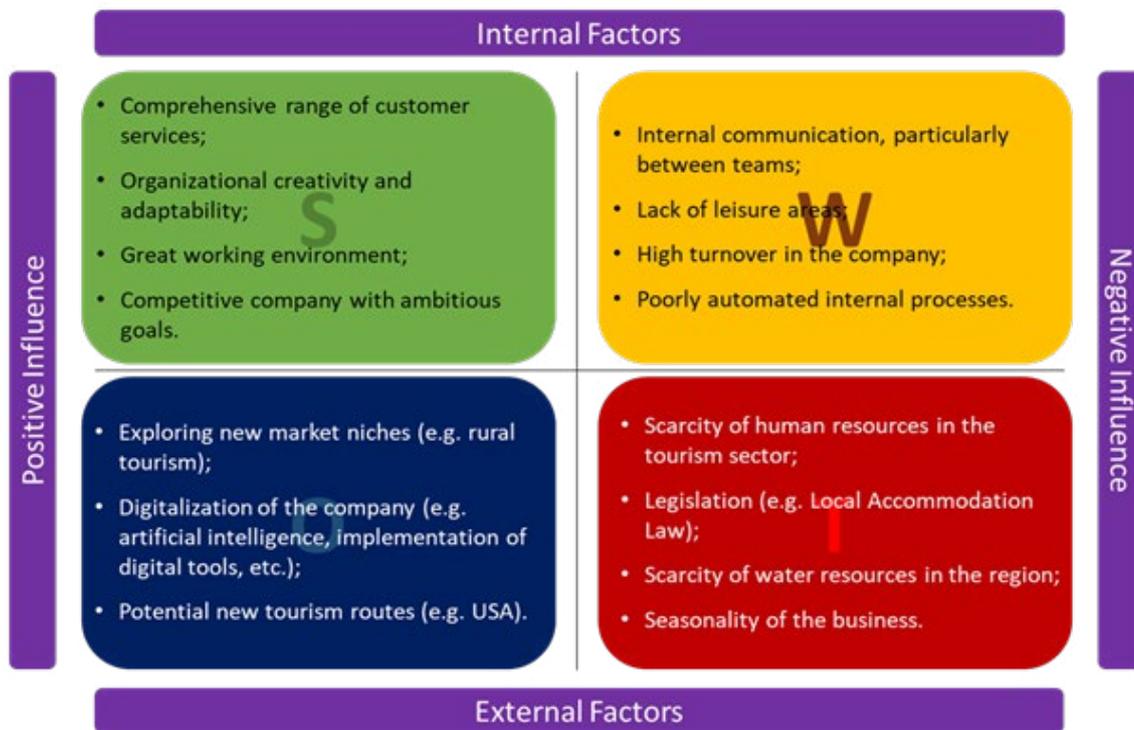
3.4 Sample

For this project, the sample consisted of a 10-member group from the A&F Department of BAP. This team had relatively homogeneous characteristics in terms of their areas of expertise (i.e. predominantly management), with their ages falling between 30 and 50 years old. Nine participants were female, but the department head was male. This sample was considered of special interest to this study due to the department’s importance in decision-making processes focussed on various aspects of the company’s operations and the team’s need to provide accurate information to other internal departments.

4. Observations and Results

The activities described in Figure 2 above took place, and the following observations were made. In Sessions I and II, a strengths, weaknesses, opportunities and threats (SWOT) analysis was conducted (see Figure 4). Only internal human factors were discussed, so other variables normally covered by SWOT analyses were considered outside the scope of this study. The results, especially the strengths and weaknesses, reveal that BAP’s main strong points are a comprehensive range of customer services, organisational creativity and adaptability and a great working environment. In addition, BAP is a competitive company with ambitious goals. Conversely, its weak points are no leisure areas for employees and a high turnover especially in departments that are more dependent on seasonal factors. Internal processes are also poorly automated, and internal communication between teams is poor.

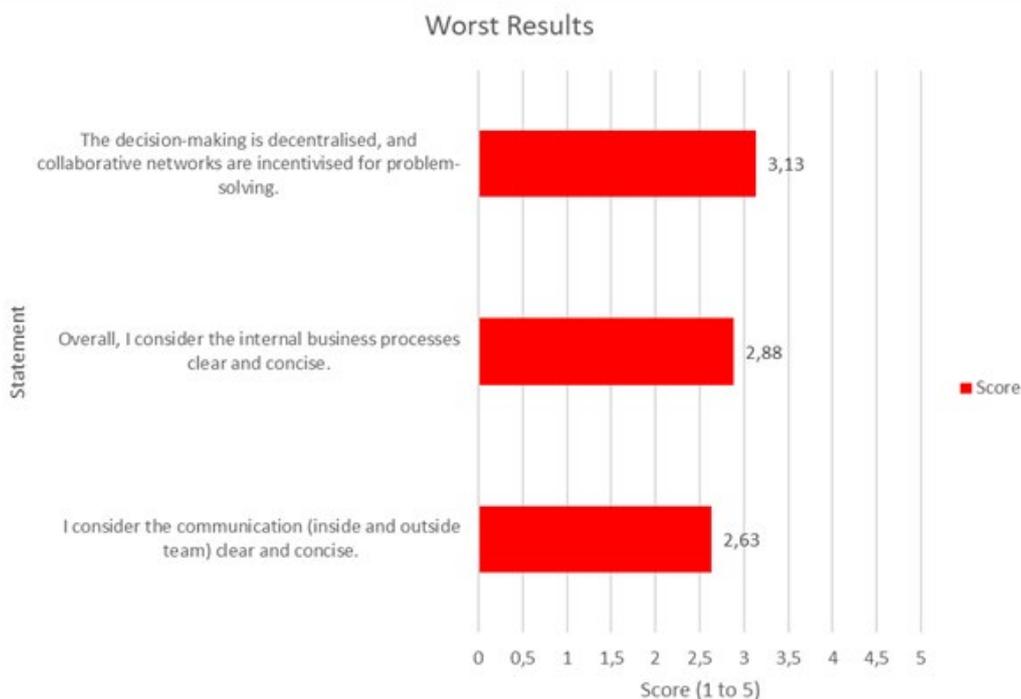
Figure 4. Buy Algarve Properties Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis



Source: Own Elaboration (2024)

In the next session (i.e. Session III), the SWOT analysis was discussed. The need for more internal communication between teams was frequently mentioned and corroborated by the findings of the evaluation of organisational culture (i.e. a score of 2.63 out of 5 points) (see Figure 5a).

Figure 5. Organisational Culture: (a) Weak Points and (b) Strong Points





Source: Own Elaboration (2024)

Two cultural features match the SWOT analysis’s strong points (see Figure 5b above): an excellent working environment and organisational adaptability. Another positive feature comprises overall recognition of personal work (4.14 out of 5 points), achievements and individual contributions (4.13 out of 5 points). Similarly, the BAP leadership is a favourable factor in terms of personal and professional development (4.13 out of 5 points), which is mentioned in the literature (State of Agile, 2023, p. 3). Based on the Session III results (i.e. the organisational culture survey), the pilot proposal shown in Figure 6 was drawn up in Session IV, with the aim of improving internal communication.

Figure 6. Internal Communication Proposal

Improving Internal Communication

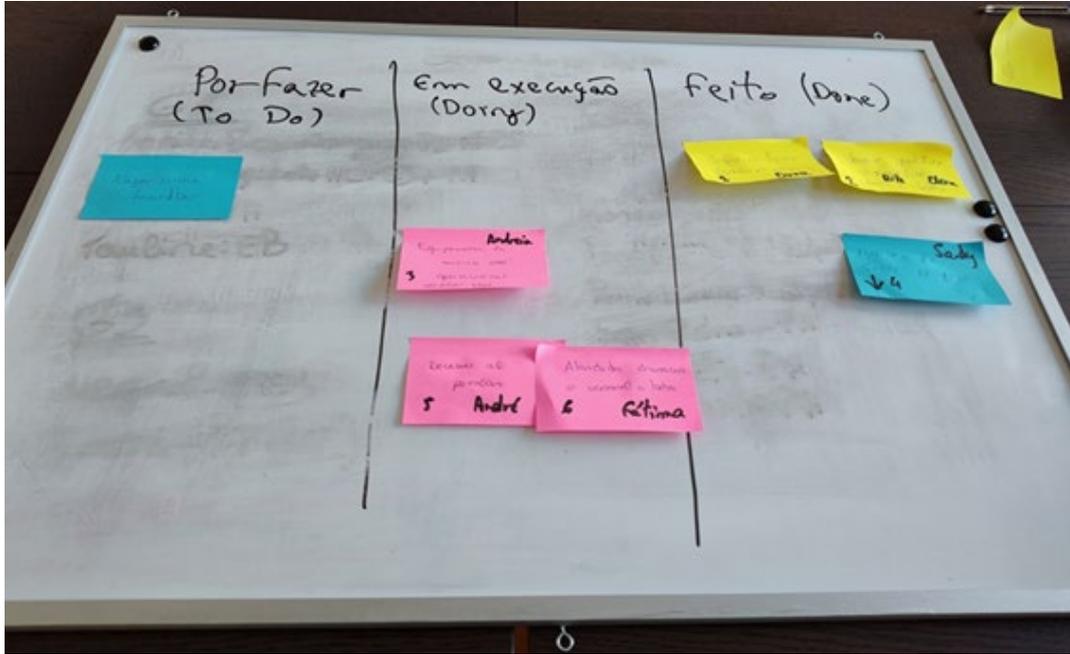
- LEAN, Kanban and Scrum fundamentals training (17/05);
- Digital Kanban Tools Training (Trello / Microsoft Planner) (24/05);
- Mapping of communication processes (Week commencing 24/05);
- Development of an action plan to enhance communication across teams (Week commencing 31/05);
- Implementation of a Kanban board for the Finance Department (physical / digital format) (Week commencing 31/05);
- Definition of the Scrum cycle (between 2 and 4 weeks) to organise team goals over time (Week commencing 31/05);
- Monitoring the progress of “Agile” implementation through synchronous sessions (Zoom / Teams), using a focus group approach (June);
- At the end of the pilot:
 - “Crash Course” / Webinar on AI and digital AI tools (TBD with team, Week commencing 21/06 - 28/06);
 - Conduct a diagnostic survey of training needs, leading to the creation of an action plan for team training as a future proposal (Week commencing 21/06 - 28/06).

Note: AI = Artificial Intelligence; TBD = To be defined
 Source: Own Elaboration (2024)

Besides the internal communication proposal, Session IV provided training in agile essentials. The latter included a physical Kanban board activity explaining, step-by-step, how tasks from the “To Do” column are assigned until they are considered “Done” and how they can be separated into Scrum cycles. This training was intended for those who were unfamiliar with agile concepts to ensure these employees un-

derstood the ways agile processes and tools can help improve team performance (e.g. see the physical Kanban board in Figure 7).

Figure 7. Physical Kanban Board



Source: Own Elaboration (2024)

The communication improvement proposal was approved by the A&F team leader and members, so, in Session V, a focus group activity was conducted on this topic. Overall, the team's internal communication was self-assessed as effective and high quality, with face-to-face (F2F) communication predominating. In contrast, interactions with other teams were considered limited and dependent on informal tools (e.g. WhatsApp) rather than standardised tools.

The participants also mentioned that BAP lacks a standardised communication policy, with each team using their own tools, about which the administration complains. The most frequently used tools are email and WhatsApp or similar messaging programmes. The A&F Department was further asked about their perspective on the main blocking points of communication, and the focus group concurred that people are the main issue.

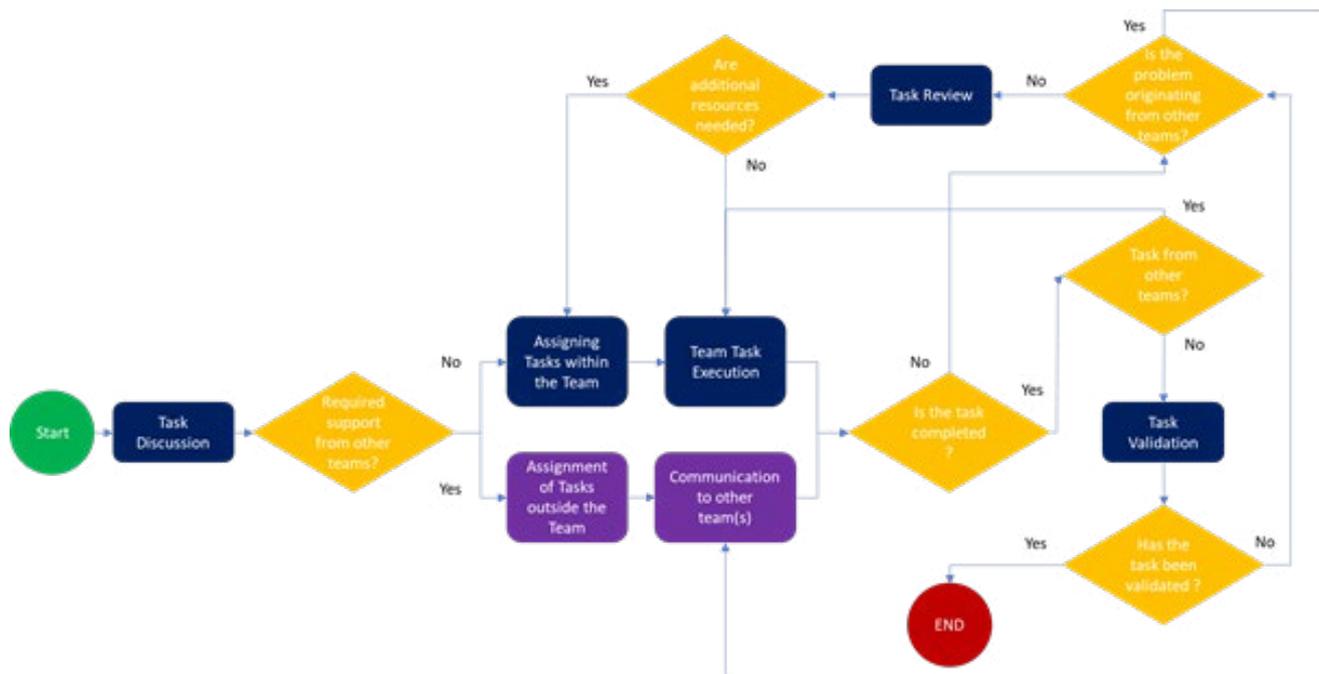
One example given was that the company usually operates from 7 in the morning until 11 at night, but reservations are done 24 hours a day, 7 days a week. Employees arrive in the office and need to look for booking information first thing in the morning. However, other teams are slow to reply to the A&F team's requests, especially for invoicing, and contacting suppliers is typically faster for this specific purpose.

The team were then asked how the internal communication process could be improved. They said that digitalising and integrating their own reservations software and applications with other digital tools would make communication more automated and streamlined.

At the end of Session V, the facilitator-consultant further recommended that the team use their Microsoft Office 365 tools (e.g. Microsoft Teams) more frequently for communication between multiple teams. They could also use agile digital tools (e.g. the digital Kanban board and Microsoft Planner) and ask HR to implement a standard operating procedure for information and communication processes.

Session VI thus comprised a discussion of the focus group results with the A&F leadership and HR team. At the end, a communication process workflow was proposed (see Figure 8).

Figure 8. Internal Communication Workflow Proposal



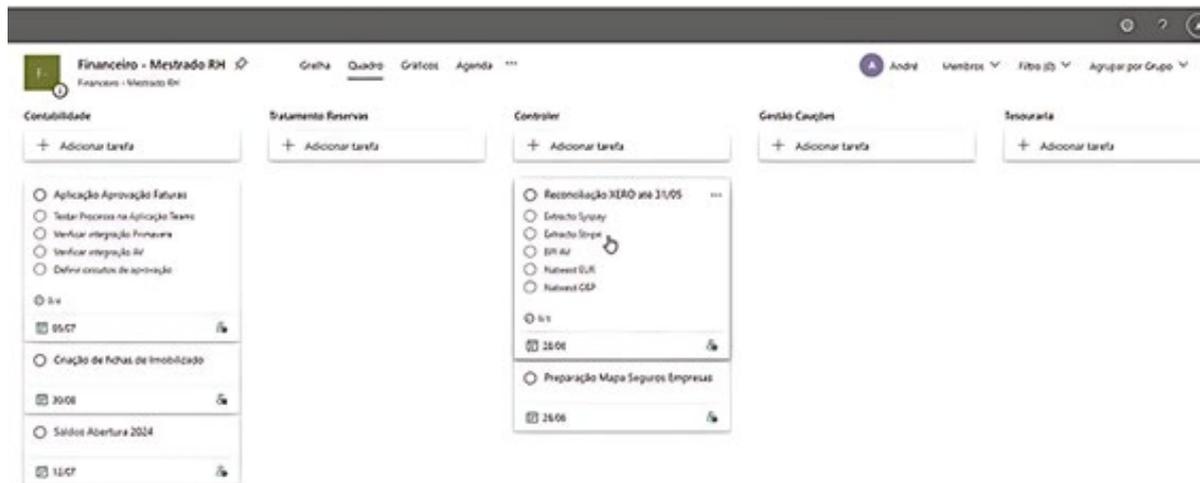
Source: Own Elaboration (2024)

In Figure 8 above, the elements in dark blue describe the communication tasks related to the A&F team itself, whereas the items in purple are the external teams’ procedures. The starting point is an internal discussion of all tasks (i.e. assigned to internal or external teams). Next, the pilot participants need to decide whether external team support is necessary (i.e. falls outside the A&F team’s purview).

When tasks are considered to be completed (i.e. either by the A&F team or external team), the specific procedures are evaluated for whether they have been concluded. If a task is assigned to an external team, that procedure is reviewed to see if it needs the A&F team’s additional involvement. If a task involves the A&F team, it is assigned to team members. Conversely, if it is considered incomplete, that procedure is evaluated to determine if the issue is due to an external team or if some aspect has to be more clearly specified by the A&F team.

In addition, if incomplete tasks are identified as dependent on an external team, that team is informed, and the procedures reassigned to them. However, if the problem lies with the A&F team (e.g. improperly defined task requisites), then that procedure is reviewed, and those members must also check whether additional resources (e.g. people or new assignments) are needed. Finally, if tasks are considered to be completed and they have been assigned to the A&F team, these validated procedures are closed. Incomplete tasks are returned to the relevant team, and the procedures follow the same flow until the “Task is done?” gateway is reached.

After the communication flow proposal, the facilitator-consultant also recommended that the BAP HR team and A&F leadership set up a one-month training and trial period for using Microsoft Planner as a digital Kanban tool within the A&F team. The objective was to demonstrate how communication and task definition could be improved within and between different teams. Figure 9 shows an example of a digital Kanban board implemented by the team. This figure is in Portuguese because it originates from BAP.

Figure 9. Digital Kanban Board (A&F Department)

Source: Buy Algarve Properties (2024)

This last stage of the pilot programme was less successful than previous steps because the peak season had started and the participants were less available. The A&F team also mentioned that, although they found the digital Kanban tool to be useful, they favoured using F2F communication internally. Finally, they would have preferred to implement Microsoft Planner in a new pilot involving more teams.

The trial finished with all the tasks of the Agile4ALL pilot considered to be done. A future partnership was proposed to the client in order to expand the pilot programme to include other teams. The final Agile4ALL session comprised a crash course in how to use AI tools (e.g. ChatGPT) and a training needs assessment questionnaire to be shared with BAP's HR Department.

5. Discussion

The above observations facilitated the identification of determinants that can be favourable or unfavourable to agile HR transformation processes. Table 6 provides a summary of the positive determinants and an overview of their effects.

Table 6. Positive Determinants for Agile Human Resources (HR) Transformation Processes

Determinants	Overview
Use of interactive methods to explain agile concepts (e.g. OPERA and Metaplan)	Facilitates group dynamics Promotes greater openness to feedback (Metaplan, 2021; urbact.eu, 2024) Explains agile concepts in practical ways
Intrinsic motivation and team adaptability	Improves productivity Fosters higher resilience during changes Encourages more openness to feedback (Arndt, 2020)
Team network structure	Preserves information about organisational relationships between employees Facilitates more openness to more informal communication (e.g. face-to-face) (Brass, 1985; Tröster et al., 2014; Zavyalova et al., 2020)
Participants' availability	Provides a greater diversity of opinions and group dynamics
Focus group approach	Encourages more participation and diverse opinions from team members (Silva et al., 2014; Trad, 2009)
Open and informal communication	Fosters greater cooperation between participants and facilitators (Zavyalova et al., 2020)
Moderator's technical knowledge of agile HR concepts	Comprises a critical condition for knowledge transfer processes of agile HR practices and addresses technical gaps within pilot teams

Note: OPERA = Own Opinion, Peer Opinion, Expose, Rank and Arrange.
Source: Own Elaboration (2024)

Based on the results in Table 6 above, the conclusion was reached that combining interactive methods (e.g. focus groups) and/or open and informal communication promotes group dynamics and participation, better transmission of agile HR concepts and greater co-operation between the participants and facilitators. In addition, these determinants depend positively on teams' intrinsic motivation, adaptability, structure – especially network structures – and availability (i.e. more participants providing a more diverse opinions and stronger group dynamics). Another determining factor is the facilitators' technical knowledge of agile HR concepts, which is crucial to overcoming the team members' technical gaps.

Table 7 lists the negative determinants identified, namely, the team's poor technical knowledge of agile HR concepts, the participants' availability – especially at the start of the high season in the Algarve – and resistance to change. For example, the facilitator explained that BAP needs to improve internal communication processes and formulate standardised internal communication procedures, but resistance to change delayed the adoption of new agile processes within the A&F team. Thus, to address the listed issues, facilitators must use more transparent communication to explain agile transformation processes concisely, as well as applying a relationship strategy to pilot teams (Espinosa-Curiel et al., 2018) and critical stakeholders (e.g. the leadership and management).

Table 7. Negative Determinants for Agile Human Resources (HR) Transformation Processes

Determinants	Overview
Little technical knowledge about agile concepts	Delays teams' adoption of agile practices (State of Agile, 2023; digital.ai, 2024)
Participants' availability	Limits agile implementation, especially at the beginning of peak seasons (i.e. June in the Algarve), restricting pilot programmes in the tourism sector to implementations between the end of a peak season and the beginning of the next one
Resistance to change	Delays the team's adoption of new processes

Source: Own Elaboration (2024)

6. Conclusion

The present study found that implementing agile HR projects in H&T SMEs is viable. However, some findings need to be taken into account, of which the first is the seasonality of this sector. The results reveal that the smaller number of team members and their heavier workload at the beginning of the peak season can be limiting factors, especially given the participants' reduced availability to attend the pilot sessions. Thus, these agile pilot programmes should be implemented between peak seasons.

The second finding is mentioned in the agile HR literature. That is, experts strongly recommend making sure the administration is supportive of each pilot project to increase the chances of success. The last finding is that the pilot programme's expectations and strategic objectives have to be explained to the team leaders and HR. If they have no knowledge or are unaware of these goals, the implementation can be seriously hampered or even unachievable, as well as meeting greater resistance to change from pilot teams.

Similar to other countries, most of Portugal's tourism companies are SMEs, which need to develop and adapt extremely quickly. The chosen company operates nation-wide, with local branches in the Algarve. The important A&F Department experienced positive internal results from this agile HR management strategy, so the top administration can learn from this positive example and use it as a starting point for a company-wide agile transformation and for other H&T businesses.

For this pilot programme, the adoption of agile processes and tools was facilitated by the company's and the specific team's size, thereby confirming the findings reported in the literature. The team structure was akin to a Scrum team, which facilitated the implementation of agile HR practices.

However, the study ascertained that the lack of a theoretical and practical understanding of agile tools and processes can hinder and/or restrict the adoption of these practices, which also matched the limitations mentioned in the literature. Thus, facilitators must bridge any pilot team members' technical gaps

to allow everyone to achieve a similar level of knowledge of agile HR practices. Another issue that arose during the pilot programme was the need to formalise the company's communication processes since these were decentralised and unstandardised. This limitation inspired the proposed flowchart of intra- and inter-departmental communication (see Figure 8 above).

The conclusion was reached that, among the methods implemented, the focus group was a particularly effective way of identifying organisational problems. This tool fostered greater openness and involvement among the participants, especially in combination with interactive techniques such as OPERA and Meta-plan. In addition, physical and digital Kanban tools (e.g. Microsoft Planner) can potentially improve internal communication. In the current study, the gains were less significant than expected given a preference for F2F communication approach due to the existing communication and team network structures. Finally, the results of the pilot indicate that, with a well-defined, properly timed strategy, an agile HR approach can improve overall organisational efficiency.

In a nutshell, the Agile4ALL is a viable approach to implementing agile HR practices in H&T SMEs despite the constraints encountered throughout the project. Overall, this programme has the potential for improving businesses' operations through agile HR management.

6.1 Limitations and Future Research

As in all academic studies, this research had limitations. The study was designed as a time-constrained pilot project, so a few points need to be addressed in future research. First, the sample comprised a limited number of H&T companies in the Algarve, namely, a single branch (i.e. BAP). Other businesses in this sector and region should be analysed to ensure more comprehensive results.

Second, the participants' availability limited the end-to-end implementation of the project, which had to be restricted to the pilot phase. Best practices suggest at least 6 to 9 months for future implementations to allow for greater practical consolidation of team members' knowledge about agile processes and tools. Thus, future pilot programmes need to be extended to facilitate the deeper assessment and integration of agile HR practices.

Third, the project was limited geographically to the Algarve because this region has a larger influx of summer tourists. Similar pilot programmes should be tested in different regions and/or tourist areas with contrasting tourism characteristics.

Fourth, this pilot was additionally restricted to the H&T sector and SMEs. Researchers could conduct multi-case studies across diverse SMEs and sectors to enhance generalisability. Investigations can also examine the impact of organisational size, culture and external environmental factors on agile HR adoption. To this end, practical experimentation needs to be carried out in companies from other sectors and/or of other sizes in order to ensure a broader comparison of how agile HR transformations unfold in organisations with different characteristics.

Last, the present project with agile instruments was restricted to a single team, especially the digital Kanban board. Future studies of agile tool implementation should also include pilot projects with more than a single team to assess various teams' adoption of agile HR practices. Finally, scholars could investigate how AI and digital tools facilitate agile HR transformations.

ACKNOWLEDGEMENTS

We would like to thank Buy Algarve Properties, especially the company's administrators, HR managers and Administrative and Financial Department members, for allowing us to conduct this study with their staff, in cooperation with the University of the Algarve.

This paper is financed by National Funds provided by FCT- Foundation for Science and Technology through project UID/04020/2025 (CinTurs) with DOI <https://doi.org/10.54499/UID/04020/2025>.

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