FORMING AGILE TEAMS
WORKBOOK

Techniques for structuring and get sustainable Agile Teams high-performance ready

Jesus Mendez

Forming Agile Teams
Workbook
Techniques for structuring and get sustainable
Agile Teams high-performance ready
Jesus Mendez

ISBN 978-0-9948258-3-4

This book is for sale at http://leanpub.com/forming_agile_teams

This version was published on 2016-02-01

This is a Leanpub book. Leanpub empowers authors and publishers with the Lean Publishing process. Lean Publishing is the act of publishing an in-progress eBook using lightweight tools and much iteration to get reader feedback, pivot until you have the right book and build traction once you do.

Table of Contents

About the Workbook

This workbook contains a set of tools and techniques to help Scrum Masters, Facilitators, Agile Coaches and Agile Practitioners when forming teams. It has been created mainly to share the artifacts and techniques that I've developed from what I've learned, the challenges that I've faced and how I've got through it when Forming teams; I hope you get inspired to create your own version of these tools and I wish the techniques that I'm sharing here would bring new perspectives to your journey.

Wishing you all the best,

Jesus

The Author

Jesus is all about helping people with finding ways to reach their highest potential by offering the gift of coaching. He has contributed in delivering more than 20 projects over his combined professional career. A passionate reader, who has spent the last five (5) years observing, trying, documenting, experimenting and growing software development teams through different tools, games, activities and processes to help them walk through the stages of the group development theory proposed by Bruce W. Tuckman.

Introduction

The tools provided in this workbook pretend to offer an alternative-proven way to add more structure, transparency and visibility to the work that we do when assisting Agile teams, by combining visual explanations with techniques and tips to support our crucial role within the organization as Scrum Masters/Agile Coaches/Agile Leaders.

Inspired from what I've been doing during the past five (5) years when forming agile teams, I have created on the top of the traditional Scrum framework, what I called the "Forming Agile Teams Flow". A step by step flow, composed by nine (9) steps to facilitate understanding and give you a better idea about what, why, how and when I recommend to use the techniques suggested in the text that you are about to read.

It's important that you know that the techniques and tools that you'll find documented in this workbook, are the result of a practical journey, plenty of learning, try outs, reading, beautiful people, a lot of hours of introspection and self-growing.

My intention is to provide you with a well proven path to ease your journey and increase the impact that you would have on your teams, a way to start over that would help you help your teams to get organized, structured and navigate towards the next stage of the Tuckman's theory of group development "Storming".

I wish you all the best with reducing team's ambiguity by increasing clarity through an incredible forming journey.

About the Workbook

This workbook contains a set of tools and techniques to help Scrum Masters, Facilitators, Agile Coaches and Agile Practitioners when forming teams. It has been created mainly to share the artifacts and techniques that I've developed from what I've learned, the challenges that I've faced and how I've got through it when Forming teams; I hope you get inspired to create your own version of these tools and I wish the techniques that I'm sharing here would bring new perspectives to your journey.

Wishing you all the best,

Jesus

The Author

Jesus is all about helping people with finding ways to reach their highest potential by offering the gift of coaching. He has contributed in delivering more than 20 projects over his combined professional career. A passionate reader, who has spent the last five (5) years observing, trying, documenting, experimenting and growing software development teams through different tools, games, activities and processes to help them walk through the stages of the group development theory proposed by Bruce W. Tuckman.

Introduction

The tools provided in this workbook pretend to offer an alternative-proven way to add more structure, transparency and visibility to the work that we do when assisting Agile teams, by combining visual explanations with techniques and tips to support our crucial role within the organization as Scrum Masters/Agile Coaches/Agile Leaders.

Inspired from what I've been doing during the past five (5) years when forming agile teams, I have created on the top of the traditional Scrum framework, what I called the "Forming Agile Teams Flow". A step by step flow, composed by nine (9) steps to facilitate understanding and give you a better idea about what, why, how and when I recommend to use the techniques suggested in the text that you are about to read.

It's important that you know that the techniques and tools that you'll find documented in this workbook, are the result of a practical journey, plenty of learning, try outs, reading, beautiful people, a lot of hours of introspection and self-growing.

My intention is to provide you with a well proven path to ease your journey and increase the impact that you would have on your teams, a way to start over that would help you help your teams to get organized, structured and navigate towards the next stage of the Tuckman's theory of group development "Storming".

I wish you all the best with reducing team's ambiguity by increasing clarity through an incredible forming journey.

Forming teams

Bruce Wayne Tuckman Theory of group development
Forming, Storming, Norming, Performing, Adjourning

According to Bruce Tuckman's group development theory a team undergoes various stages with time in-order to perform with its 100% productivity level.

Tuckman, B., Jensen, M. 1997

Stage 5 Adjourning: Having completed their task the group dissolves. Members will share either a sense of loss or relief, depending on the outcome of the task.

Stage 4 Performing: Confidence grows both individually and with other members of the group as they work towards a common goal.

Stage 3 Norming: The group find ways of resolving conflict and begin to emerge as a cohesive unit. Criticisms and feedback are given constructively and members start co-operating with one another.

Stage 2 Storming: Conflict occurs as personal agendas come to light. Members assert themselves and start questioning decisions and challenging authority.

Stage 1 Forming: Members start interacting and try to work out what is expected of them. Excitement and enthusiasm is mixed with fear and uncertainty.
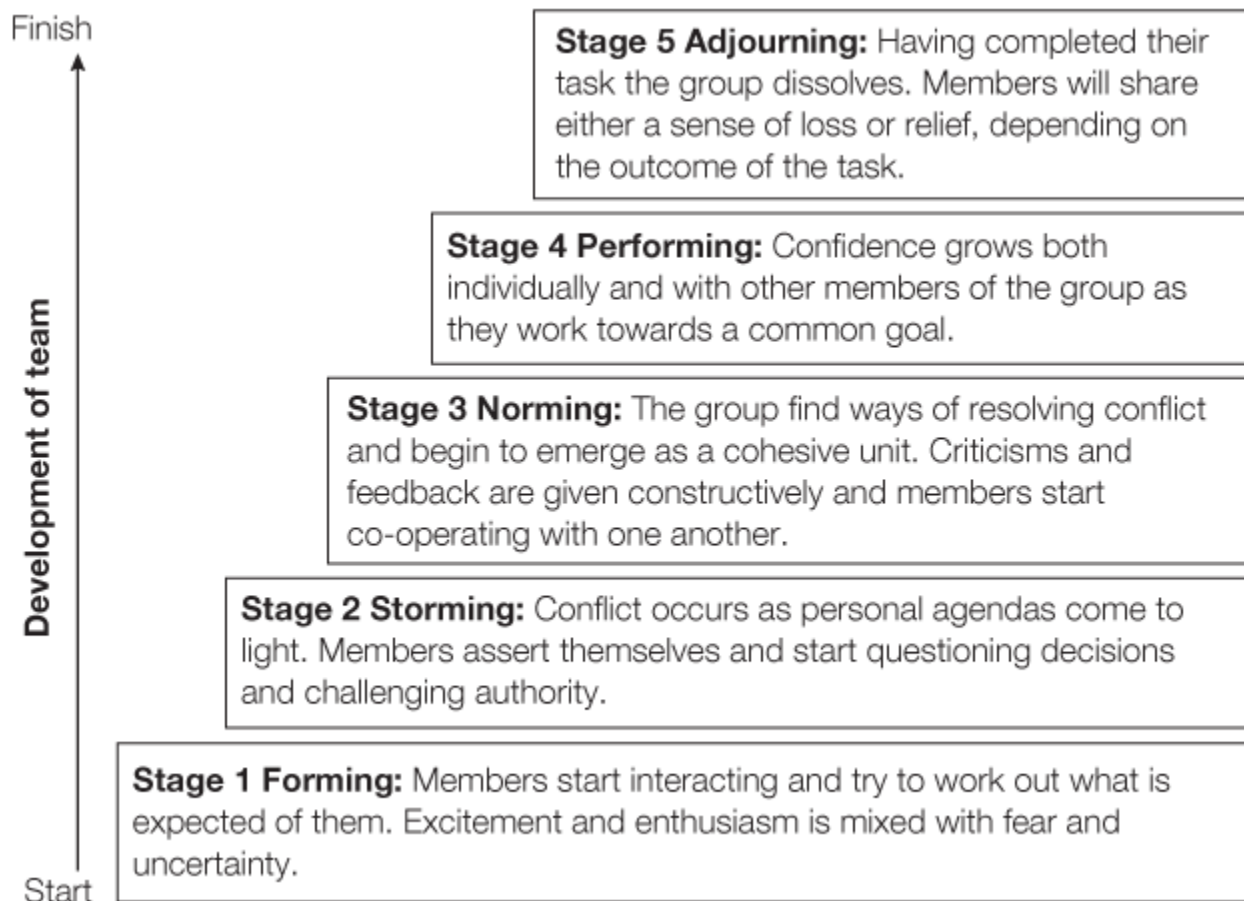
Figure 1- Tuckman's Theory of group development - Stages

Being curious and passionate about helping people and teams to thrive in a sustainable fashion had brought to me to think about the following question: how could I help agile teams navigate though each stage of Tuckman's model, in a practical way? What techniques should I use? What kind of challenges am I going to face? How do I do it?

Well, the best way that I knew by the time I've started writing this workbook and the best approach that I know so far is to do it by iterations.

This workbook describes a tested path to help Scrum Masters/Agile Coaches and Agile Practitioners navigate teams through the early stage of their development, more specifically those that are in the Stage 1: Forming of Tuckman's theory of group development model.

Let's start "Forming agile teams" by exploring some of the challenges that you'll face when doing it:

Forming Agile teams

Challenges

Everything that happens during Tuckman's theory of group development forming stage will set the foundation for the team to go through the different stages identified in this theory. It's in this stage where:

- Stakeholders will be super anxious about how things are going to work and what's planned for the team in order to get results that will bring value as soon as possible.
- Some boundaries will be set in terms of the product or service that the future team will be delivering.
- Trust will be established between you and the team and between the team members as well.
- The team will discover who does what and what makes each team member different and special.
- The identity and team's purpose will be determined.
- The tone of every single conversation that will lead the team to succeed will be set.
- Your super powers must be used to show the team what the path to sustainable high-performance looks likes.
- Your senses will be tested and you'll use them to help you decide what to do, how to do it and when to do it.

Our role in the Team Transformation Process

As Scrum Masters/Agile Coaches we have a main role within the team's transformation process. In my opinion, we should be leading the change process collaborating with a team composed by at least one representative of each group who has an interest in the team to be transformed.

Further than that, I truly believe that install common sense should be our MOTTO. Guide people, teams and organizations to understand that being agile means to use the common sense all the time. I do believe also in the benefits of connecting people by collaborating, as our main mission as people's helpers. Things that could sound easy to do but that in practice are hard to get, especially when the only authority that you would have over people comes with how much you can influence people's lives to welcome change every day.

It's a big role to lead by example and permanently be there to inspire others to inspect and adapt. It requires courage, self-awareness, humbleness, love and hope that the best will come if we do it together.

Well, that's our role in the team's transformation process. We are at heart of it, and yes it's up to you to make the difference and change the world, one team at a time.

Techniques

Let's walk together through the techniques that I've used to help teams face the challenges mentioned above, and successfully navigate from the forming stage to the next stage of Tuckman's theory of group development "storming".

Forming agile teams flow

I'm a visual person, I need drawing to put ideas together and be able to learn, digest and then share my understandings with people. One day, I was having a hard time getting thoughts out of my head; I was stuck, and frustrated because that something to connect all the dots was missing in the book. It was then when after talking about it with my friend Ida Perciballi, one of the Product Owners that I have the pleasure to work with, and after explaining her my frustration, where she proposed me this brilliant idea of creating a workflow to walk readers through the team transformation process and contextualize where to apply the techniques that I'm proposing in this workbook for forming agile teams.
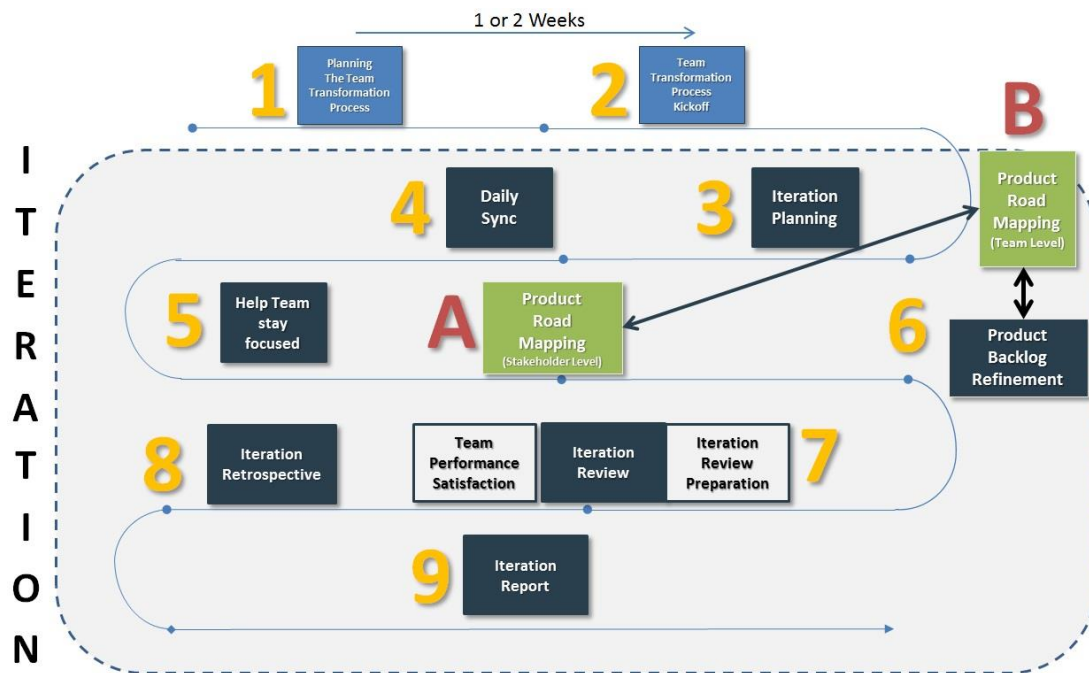

Figure 2- Forming Agile Teams Flow

That's what I thought I was looking at; to find a way to explain the techniques that I've learned when forming teams using a visual diagram to put all the ideas together and I

came up with this diagram that I've called the "Forming Agile Teams Flow", inspired by a typical sprint as described in the Agile Scrum framework.

The "Forming Agile Teams Flow" has nine (9) steps and two (2) complementary events for product planning to add an additional dimension to facilitate connecting what the team is developing (technology) with what the company wants and needs (business).

The first two (2) steps (Planning The Team Transformation Process and Team Transformation Process Kick-off) refers to the preparation work that I think needs to be done before starting forming an agile team. The other seven (7) steps (Iteration Planning, Daily Sync, Help the Team stay focused, Product Backlog Refinement, Iteration Review Preparation, Iteration Review, Team Performance Satisfaction, Iteration Retrospective and Iteration Report) have been considered to be done within the iteration time frame established for the particular agile team that you are about to start forming.

It's all done by iterations

By definition**, iteration** refers to "the repetition of a process or utterance". The Agile Alliance guide defines iteration in the context of agile projects as "a time box during which development takes place, the duration of which:

- May vary from project to project, usually between 1 and 4 weeks.
- Is in most cases fixed for the duration of a given project."

Scrum.org defines sprints as "the heart of Scrum, a time-box of one month or less during which a "Done", useable, and potentially releasable product Increment is created".

Mike Cohn mentions on his article "Differences between Scrum and Extreme Programming" what follows: "Scrum teams typically work in iterations (called sprints) that are from two weeks to one month long. XP teams typically work in iterations that are one or two weeks long".
In the context of the workbook, when it refers to Iterations we are talking about a time-box of one week to a month during which a "Done" useable product that resolves a customer problem increment is built by the agile team.

What activities compose a typical iteration in the context of this workbook?

The following table lists the activities that compose a typical iteration in the context of this workbook:

Activity	Description
Iteration	During the **Iteration**, the development team collaborates to build what has been identified during the iteration planning. The development team cooperates with the Product Owner to develop what brings more value to the customers. Iterations are flexible, so small changes are allowed by swapping stories that the team hasn't worked on, with new stories already refined together. It's possible to remove content from the iteration and teams are encouraged to embrace change to listen to use feedback. Communication and collaboration facilitates changes and keeps everyone doing what makes more sense reducing waste as much as possible.

Activity	Description
Iteration Planning	The **Iteration planning** it's a cooperative and collaborative event that requires customer voice representative (The Product Owner), the development team and all specialists need it to make the iteration goal a reality. Because the Product Owner has the most information about value (after negotiation with the customer)—he/she is the most qualified to say what is important—he/she prioritizes." "Because the development team have the most information about costs—they're most qualified to say how long it will take to implement a story—they estimate" also because they are considered the experts.

Activity	Description
Iteration Daily Sync	The **Daily sync** is considered as the "event for the development team to synchronize activities and create a plan for the next 24 hours" within the Scrum guide provided by Scrum.org.

Activity	Description
Team's Road Mapping	The **Team's Road Mapping** is an event that happens once per quarter, were the Product Owner assisted by the Scrum Master/Agile Coach, would identify what goals would be reached by the team in the upcoming three months. Once that the first version is done, the Product Owner would collaborate with the Development team to get ready to tackle what's coming within the next Product Backlog Refinement session.

Activity	Description
Product Backlog Refinement	**Product Backlog refinement** allows the agile team to keep the product backlog updated for upcoming iterations. Product Backlog refinements happens at the same time and at the same place during the iteration, at least once. The Product Owner could call for an additional Product Backlog refinement when need it during the iteration, in order to validate the potential cost (estimate) of each user story. Product backlog refinements are held to enable discussion between the development team and the Product Owner and facilitate challenging what should be done and why would be done now.

Activity	Description
Iteration Review Dry Run	The **iteration review Dry-run** is the event where the agile team would prepare what would be delivered at the iteration review. It's a 30 minutes to 1 hour meeting, for the development team to go through the iteration backlog in order to validate with the Product Owner, what has been done and what is left to be done. By using the Iteration Review Template, the Scrum Master/Agile Coach would help the team to organize the information to be shared at the iteration review, like for example the iteration status, what would be demonstrated, what would be the list of updates (no demo include it), what's worthy to be shown event if is not 100% done and what's next in terms of the Product.

Activity	Description
Iteration Review	The **iteration review** is the event where the development team shows the work that's completed within the iteration and that has been validated and approved by the Product Owner. It's also the time within the iteration to collaborate with stakeholders about the Product and get feedback about the work that the team has done.
	By the end of the Iteration review, it's time to evaluate the **team's performance satisfaction** regarding the work that the team has done during the iteration. By using The Team's Performance Satisfaction Template, stakeholders and the agile team would share their happiness level regarding the team's performance; by tagging their names into the face that reflects better their impression about the team.

Activity	Description
Iteration Retrospective	During the **Iteration retrospective**, the development team collaborates to develop what was identified during the iteration planning. The development team cooperates with the Product

Activity	Description
	Owner to develop what brings more value to the customers. Iterations are flexible, so small changes are allowed by swapping stories that the team hasn't worked on, with new stories already refined together. It's possible to remove content from the iteration and teams are encouraged to embrace change to listen to use feedback. Communication and collaboration facilitates changes and keeps everyone doing what makes more sense reducing waste as much as possible.

Activity	Description
Iteration Reporting	By the end of the iteration, the Scrum Master/Agile Coach will create the **Iteration Report** by using the Iteration Report Template in order to increase visibility at the organization level about what the team has done during the iteration, raise risks and create awareness by being transparent.

Iterations: How long it last?

It really depends of the team. In my experience, two (2) weeks iteration is good enough for the development team to deliver high quality products and for the organization to keep participating on agile ceremonies.

> 💡 **Tip:** If the team identifies the duration of iterations as an impediment to finish what they commit to, challenge the team to look for the root cause of the issue. Usually what happen is that the team is over committing or something else hidden is causing the team to ask for more time to finish what needs to be done.

In my experience, I like to suggest my teams to avoid changing the duration of the iteration, so then the agile team can develop consistency, create its own pace and set a rhythm.

Why iterations?

Some of the principles behind the agile manifesto justify the fact of having iterations to develop software:

> **"Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale"**

**"Agile processes promote sustainable development.
The sponsors, developers, and users should be able
to maintain a constant pace indefinitely"**

**"At regular intervals, the team reflects on how
to become more effective, then tunes and adjusts
its behavior accordingly"**

From what I've seen in the field when forming agile teams, iterations facilitates team learning by allowing repetition that would set team habits with time and gives the required structure to shape teams growing.

So let's start doing it!

1. Planning the team transformation process

Before meeting with the team that you are about to start working with, there is a change to be managed, planned and communicated, and that's the change that you are about to begin when transforming the team into a high-performing sustainable team. A change that requires a lot of effort in time and money which, in my opinion, needs to be supported with a transition plan. But why do we need a plan to transform a team, isn't it something that's going to happen in an agile fashion, I mean iteration by iteration? Why should we care about planning changes, when playing the Scrum Master or Agile Coach role? Well in my personal opinion it depends, but I prefer to have a clear understanding about what's motivating the stakeholders to invest resources in what I've called "the team's transformation project".

At this stage of the project, there is not a lot of information about:

- The reasons behind hiring or even assigning a Scrum Master or Agile Coach to the team.
- Who does what, when and how things are going to happen (what's the plan?)
- The team and its composition.
- How the team works.

What's the main GOAL here?
"Mitigate change resistance by reducing ambiguity, increasing visibility and creating awareness about the project at every level involved"; in order to gain the people's trust and create the required conditions to successfully reach the people's heart.

How to do it? How to get everybody involved in the project and on the same page?
First of all, I gather enough information to create the "project charter", by talking with all the parties involved in the "team's transformation project". Here are the steps that I follow to complete this stage of the process:

Preliminary work (It's all about the team and the environment)

Purpose: Get ready to talk with project's main stakeholder.

Tactic: Collect information about the team by meeting with their line manager(s) and asking questions like:
- Is the team being formed for this specific project?

- How long the team has been working together?

> 💡 **Tip:** Try to understand how the team works first and then think with them, what to do next.

- What about team's development process?
- Who are the main stakeholders of the project?
- Who are the customers?
- How does the team work?

Project Charter content gathering meeting

Purpose: Collect enough information to get everybody on the same page and begin the project as soon as possible.

Tactic: meet with project main stakeholder(s) to answer a list of crucial questions for the project:
- What's the project about?
- Why are we doing this right now?
- Reason and strategy
- Who is doing what? Help with identifying roles and responsibilities.
- What are the biggest business and operational risks, associated to the project?
- What's your vision of the team a year from now?
- What are the top three main goals, for the short term (3 months ideally)
- Is there any suggestion on how the process of the team's work should be conducted?

Outcome: The team's transformation process Project Charter information has been gathered.

Fill the Team's Transformation Process Project Charter template

Purpose: Document the shared understanding baseline of the project.

Tactic: Focus on documenting just enough information to describe what the project is about.

Outcome: Team's transformation Project Charter is completed and ready to be shared.

> 💡 **Tip:** Keep it simple and document no more than two (2) pages.

High level project plan approval meeting

Purpose: Get common agreement about what the project is about and get the project plan approved. Begin working with the team.

Tactic: Focus on documenting just enough information to describe what the project is about.

Outcome: Team's Transformation Process Project Charter has been approved.

Team's transformation project kick-off meeting

Purpose: Shared understanding for team project members about the team's transformation project.

Tactics: Hold a one hour meeting and be sure that all interested parties are present. Ask the main project stakeholder to set the stage by sharing with the audience the two first components of the team's transformation project charter:

1. What's the project about?
2. Why are we doing it right now?
3. Reasons and the strategies to get it done.

Now it is your turn to go through the remaining content of the team's transformation process project charter:

1. Roles and responsibilities
2. Vision of the team in one (1) year from now.
3. Short term main goals identified.
4. High level project risks.
5. Identify the next step in the plan

> 💡 **Tip:** Print out a copy of Team's transformation process project charter for every person present in the meeting.

2. Team transformation process Kick-off

Preparation
Once the Team's transformation project charter is approved, it's time to meet with your new team and start building the relationship of trust required to move forward with the transformation process.

What's the main Goal here?
Establish a relationship of trust between you and your team that would enable the path to the continuous improvement on-going conversation for the team.

Why is this priority?
If you consider yourself as a change agent, the main thing for people to start changing their mindsets is to trust the person who represents change. Having their trust means getting their hearts and believes in you and what you will bring to the team.
How to do it? How to establish a relationship of trust?
The focus here is to create the conditions and environment to make people feel safe enough to get out of their comfort zones and learn to change continuously.

Let's discuss about what needs to be taken into consideration at this stage:
- What's the team history?
- Who are the team sponsors?
- Who are the key people in the team?
- How is the team doing things?
- How to know that the relationship of trust has been established?

It's all about the people
Getting to know the people that you're about start working with requires time, love and strategy. In my case, I use the steps of the arc of a coaching conversation to approach the team and start learning about them.
The first thing that I do is "**start exploring**". Depending of the project, I give to myself a full iteration at least to explore and observe respectfully how the team behave, interact, collaborate and work together. During this period I would try to identify:
- What type of team is this? Hierarchical, Breakthrough, Synchronized, Open.
- Who are the key people within the team? Identify their names.

- About people's collaboration: Does it exists?: Yes or No
- About people's motivation: Is everybody motivated? Yes or No
- About people's interactions: What's the voice tone used between people in the team? Positive, Negative or Other Tones [3]

What's the main focus here?

Our main job here is to be present for the team and be ready to listen actively what and how it's being said. The intension here is to get enough contexts about the team so it's recommended to avoid judgement, and put your ears up.

> 💡 **Tip:** Being outside of the group as an observer would show the team that you respect their space. Pay attention to where you place yourself. I use to stay out of the team.

In order to help explore, I like to use "What" questions, combined with a polite approach, for example:

- About the recurrent meetings that the team have, would you mind to tell me what's the team's schedule?
- About the development process, what are the steps of the team's current development process?
- About the team, what does the team likes about working together?
- About the project, what are the project main goals?
- About the product/service, is there any product/service vision available? Do you mind to share it with me?

The leadership team first

Some of the questions mentioned above, would be answered directly by the leadership team; I mean the Project Stakeholders, the Product/Service owner and the line manager(s). That's why I strongly recommend meeting with them first, in order to discuss about their vision regarding the project, the product or service and the team.

The leadership team would be supporting what we are about to do with the team, that's why it's really important to get them on board collaborating with us, to enable the change within the team, then with the project, and so on.
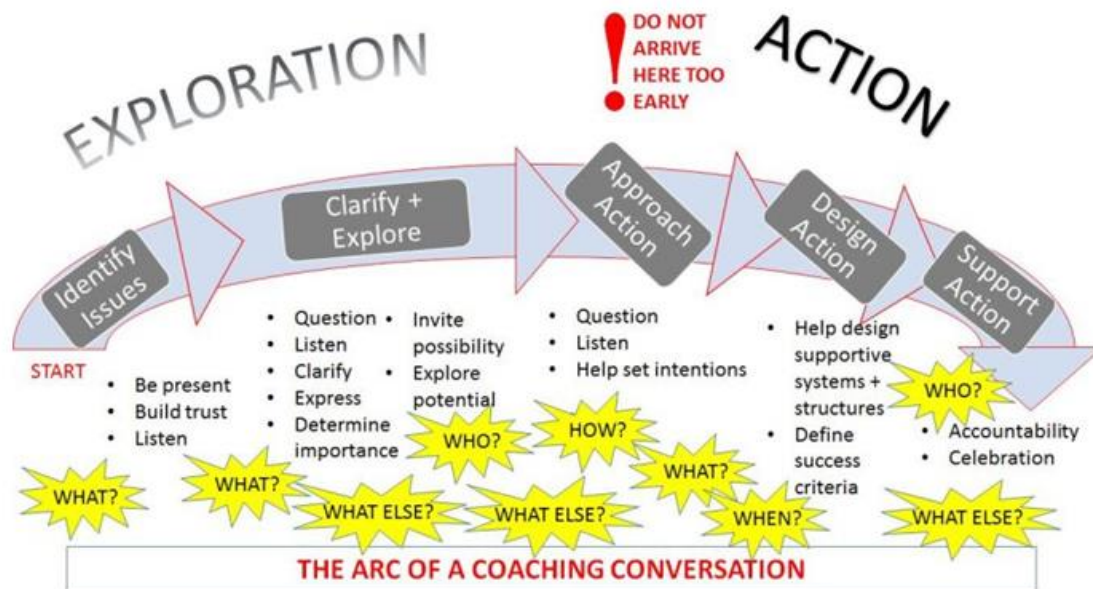
Figure 3- the arc of a coaching conversation

Project Stakeholders

Scott W Ambler in his article "Active Stakeholders Participation: An Agile Best Practices" defines Stakeholders as " anyone who is a direct, indirect user, manager of users, senior manager, operation staff member, the "gold owner" who funds the project, support (help desk) staff members, auditors, your program portfolio manager, developers working on other systems that integrate or interact with the one under development, or maintenance professionals potentially affected by the development and/or deployment of a software" So people directly impacted or potentially affected by the changes done to the software under development. I really like the stakeholder categorization done by **Carl Kessler** and **John Swetizer** on their book Outside-in Software Development, also mentioned by **Scott W Ambler** on the article referred above:

- Principals (the people who buy your software),
- End-users (the people who interact with it),
- Partners (the people who will make your software work in production),
- Insiders (people within your organization that impact how your team works).

Stakeholders are responsible for the project, product or service that the team will be working with. Its participation and permanent support to the product that would be develop and the team that would be behind of it would be crucial along this stage of the

team's transformation process. This role is crucial given that they would challenge what product owners would do along the way and collaborate with the team to build appropriated product solutions to solve their problems or needs. Regarding the stakeholders and their expectations about the team that would be formed, I like to ask only the main stakeholder, to join the Product Owner and meet to discuss about **Product development expectations**, in a meeting that it's explained below.

Product Owner

The Product owner, it's responsible and accountable for the project, product or service that the team will be working with. This role matters because money wise these people are making decisions about what would be delivered, why now and when it should happen. Their capacity to oversee how their product or service would look like in the future, how to plan efficiently to get there and how that is communicated, pass through what kind of team they thing its needed to reach established business goals. I'm referring here to expected team attitude and behaviour, how problems get resolved, the team's capacity to deliver on time, the team's capacity to perform under pressure and their ability to adapt to continuous changes. Here some techniques that I use to help with setting clear expectations about the product, the team and how we are going to work together:

Product development meeting

What's the purpose of it?

- Get to know each other better
- Discuss about the product/service vision
- Clarify expectations about the team, in terms of:
    - Attitudes and behaviours
    - Communication style (Command and control/Open communication)
    - Collaboration (Restricted/Completely open)

Clarify expectation about how we are going to work together:

- Role and responsibilities
- How to collaborate towards reaching amazing results.

- Everything else that you considered makes sense for your specific context

Expected outcome
- Product Owner and Scrum Master/Agile Coach way to work has been established.
- Stakeholder team expectation has been discussed and clarified.
- Product Owner and Stakeholder way to work has been established.

> 💡 **Tip:** If there is no Product Vision available, I strongly recommend start discussing about the goals of the product for the next three (3) months and make that visible for the team. You could use *the **Team Road-map template*** *to help you out with it*

Product planning weekly based meeting

What's the purpose of it?
- Assist/Support with keeping the team focused on what's important.
- Assist/Support with keeping the Product Backlog iteration planning ready.
- Help with visualizing what's next in the product pipeline.
- Create inspect and adapt mindset about the product.
- Assist/Support with creating the Product Vision.
- Create product planning habits.

> 💡 **Tip:** This is good opportunity to explain and discuss about what your role and responsibilities are, regarding the team. Avoid assuming that the Product Owner understands what the scope of your role is. Share details about commanding-controlling versus influencing and empowering instead. When do you intervene and why it's important to let the team learn from failure

Expected outcome
- The Product has been planned and the Product Owner team is able to communicate what's next to stakeholders and then to the team.

From what I've seen in the field, Product Owners wants to rely on a team who delivers results consistently, as soon as possible, so please let's remember that when working together with them as our main goal.

> 💡 **Tip**: If there is a Product Road-map available, I strongly recommend start discussing about it, in order to help the Product owner set what's next for the team. If there is no Product Road-map available, you could use *The Product Road-map template to help you out with it.* In any case, it's highly recommended to bring this artifact to the meeting and ask to be updated.

Line Managers

Line manager(s) main role is to support their employees activities by providing them the required tools needed to do their job. In an agile environment, there is an additional support required and that is for the development process. Line manager's capacity to allow Scrum Masters/Agile coaches do their job, and the ability to empower teams to self-organize their work, would be a key factor to consider when working with teams. Here some techniques that I use to help with setting clear expectations about management roles, how to support the team and how to collaborate with the Scrum Master/Agile Coach:

Touch base regularly

I use to have monthly one on one with Line managers where we discus about how the team is doing, what the biggest road blockers are and what's my Scrum Master/Agile Coach perception about their happiness.

- o **Benefits:** Meeting often helps with increasing collaboration between the Scrum Master and the line manager, brings insights about their employees, create opportunities for crucial conversations and speed up the decision making process not matter how things are doing for the employees.
- o **Potential risks:** Monthly meetings are time consuming and it could be challenging to keep the mechanism ongoing, when working with more than two teams at the same time.

Keep the collaboration channel open

Especially in agile setups, Line manager's need to be creative to find ways to connect and discuss with their teams, without interrupting their flow or becoming impediments to their job. Something that I have tried is to allow especial time at the end of the iterations, I mean after the iteration review and before the iteration retrospective, where they would discuss openly with the team about how things are doing.

- o **Benefits:** What I've experienced is that line managers love to get in touch with their employees and having the time to do it, allows them to connect and build the relationship of trust. For the employee, it could become a timeframe to express issues, ideas or feelings about the job directly with his/her manager. This mechanism could save money and reduce overturns when referring to people leaving the company.
- o **Potential risks:** It could be perceived as a waste of time, especially for the Product Owners.

From what I have seen in the field, Line Managers wants you to help them with forming agile teams that delivers high quality results consistently and do it faster, so please let's remember that when working with them along this stage of the team's transformation process.

The Kick-Off meeting

Now, it is time for you to create the team's transformation process project charter and get ready for the kick-off meeting. Here the elements to be considered when building project charter:

Team's Transformation Process Project Charter Template

What's this project about?

I.e. The cars division wants to rely on team that's able to deliver any kind of work any time on time and within the forecasted budget.

Why are we doing it right now?

Reason	Strategy
I.e. Focus on what brings value to the division in order to increase the Return Of Investment per project	I.e. Optimize where the company put its efforts by distributing properly the content to be integrated.
I.e. Increase operational efficiency	I.e. Improve project planning and prioritization at the Product team level
	I.e. Increase collaboration with directors and different stakeholders
	I.e. Build a high performing sustainable development team

Figure 4-Team's Transforming Process Project Charter-Reasons

Vision of the team 1 year from now

- i.e.: A fully collaborative and cross functional team is in place.
- I.e. Every member of the development team can work on any project at any time.
- I.e. Knowledge is shared within the team and that's done via development process.
- I.e. A high-performing sustainable development team is in place.

Main goals for the next three (3) months

- i.e.: Team`s Development process is implemented end to end
- i.e.: Development team backlog is healthy (Properly prioritized based what the business wants and what brings more value)

Roles and responsibilities

Role	Responsibilities
Main Stakeholder (Full name)	- I.e. sets high level vision for the content to be developed. - I.e. negotiates priorities with Customers. - I.e. helps Product Owners make the vision and corporate goals tangible in the development team backlog
Product/Service Owner (Full name)	- I.e. manages development team Backlog - I.e. decides what to do and when (Establishes backlog priorities) - I.e. negotiates priorities with main Stakeholder - I.e. leads development team to deliver the content of its backlog - I.e. collaborates with the Agile Coach/Scrum Master in order to create a high-performing sustainable team. - I.e. collaborates with the delivery team with refining the development team's backlog
Agile Coach/Scrum Master (Full name)	- I.e. Sheppard's team`s development process - I.e. coaches the team to become a self-organizing and high-performing sustainable team - I.e. coaches Product Owners with managing the team's backlog and with leading the team. - I.e. facilitates all team ceremonies - I.e. facilitates interactions between team members - I.e. removes impediments from the way of the team
Development team (Name of the team or description)	- I.e. does the job to (description of what the team does).... - I.e. delivers high-quality _____ for <division/unit/client> - I.e. collaborates with Product Owners and the Agile Coach/Scrum Master to increase team's performance - I.e. raises impediments and make them visible to

	the team.
Line team manager(s) Full Name	▪ I.e. brings support to the team and the development process ▪ I.e. collaborates with the Agile Coach/Scrum Master with removing impediments
Stakeholders (List of all stakeholders)	▪ I.e. collaborates with the team and the Product team with grooming the content of the development team backlog

Figure 5-Team's Transforming Process Project Charter -Roles and responsibilities

High level Risks

Risk Category	Description
Human Resources	I.e. peoples resistance to change
Communication	I.e. limited support from Stakeholders and PO's.
Communication	I.e. Unclear goals, and unshared vision
Communication	I.e. Unclear roles and responsibilities
Resources	I.e. project loses interest and stakeholder stop funding it

Figure 6-Team's Transforming Process Project Charter -High level risks

Process high level guidelines

I.e. This team has been using Kanban as their way to deal with requirements. There are no special events, no time boxed iterations are set and no feedback loop in place.
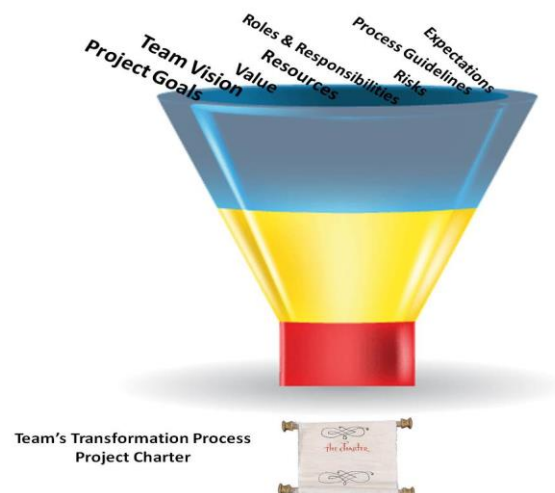
Figure 7- Team's Transformation Process Project Charter

Kick-off meeting setup

Once the Team's transformation Process Project Charter got completed is time to set up for the kick-off meeting. Here some of the elements to take in consideration:

1. Share and discuss the document with the main stakeholder, the line managers and the Product Owner(s).
2. Verify that everybody is OK with its content.
3. Organize the kick-off meeting agenda.
4. Schedule the meeting
5. Be sure that all parties involved get invited.

During the Kick-off meeting

At this stage of the process, the Team's Transformation Process Project Charter has been created, the Kick-off meeting has been setup and the day has come to start interacting frequently with your new team. In order to facilitate this process, I like to follow this agenda during the kick-off meeting:

Agenda	Responsible
1. Kick-off meeting's goal	Product Owner/Main Stakeholder
2. Team's Transformation Process Project a. What this project is about b. Why we are doing it right now c. Vision of the team 1 year from now d. Main goals for the next three (3) months	Product Owner/Main Stakeholder
3. Team's Transformation Process Project **Roles & Responsibilities**	Scrum Master/Agile Coach
4. Team's Transformation Process Project **High Level Risks**	Scrum Master/Agile Coach

Figure 8 - Team's Transformation Process Project - Kick off Agenda

The Development team

Once the project has kicked-off and the leadership team has been approached, the main focus is the development team and how to start working together. With a little help of the Product/Service owner and the development group/team, I would find ways to get to know them as much as possible. Here some techniques that I use when approaching the team and start building the relationship of trust:

Get introduced by somebody already trusted

After asking the leadership team, and a couple of quick chats, it would be nice to ask that person that is already trusted by the team, to introduce you to the group. Using this reference, would influence people's opinions, ease assumptions and avoid unnecessary judgements to could get in the way of creating an amazing and productive relationship based on trust. If that's not possible, I love to ask another Scrum Master (if available) to do it for me.

- o **Benefits:** I haven't invented this, and this is what I use when meeting others to get closer to them. I see it like this: If I trust you and you trust him/her then I will trust him/her.
- o **Potential risks:** It requires the right attitude, the right people and it's highly contextual based, so there is an elevated risk that this technique doesn't work.

> 💡 **Tip:** This act is really important, so please paying attention to details matters here. I would strongly recommend going with your common sense. Imagine this act as the most important event of your future work relationship, so be your more authentic self and listen to them first.

Be humble and listen

At the moment that you join a new team, people start to observe how you behave. It's normal to expect that people would try you in different ways and with different things during this stage of the group development. Group acceptance, knowledge validation, shared interests and leadership still would be under testing in this face, so please be humble and listen actively to what their trying to say.

- o **Benefits:** As much as they feel listened and that you're not a thread to them and that you're there to help them with honesty, you would gain their trust and they will slowly open up to you.

> 💡 **Tip:** *"Your job here is to create the container and let them create the content and remember that it's not about you, it's about them"*

- o **Potential risks:** Personal attacks from people dysfunctional behaviors could be recurrent here and could make you and the feel uncomfortable, just remember.

> 💡 **Tip:** *"It's not about you; it's what you represent to them, so please do yourself a favor and don't take it personal"*
> **Omar Bermudez, Coaching session, Montreal 2013**

Give you time to observe

If you're the type let's go and change the world today and tomorrow everything would work fine, well I think that you will learn soon about this way to go. Instead what I do is to take at least a full iteration to just observe and take notes about how the team works, interact and how is everything happening for the team.

- o **Benefits:** Giving yourself time to observe the team, would offer you the chance to have a better comprehension about the system that the team has become. It would give you insights to validate how to proceed in the future. It would also get you a closer look about who's playing which role in the team, and that could lead to ideas about how to approach individuals next.
- o **Potential risks:** This could create the perception that you're doing nothing to help the team, so be careful and communicate your strategies before to everybody involved in the transformation project.

Be actively present, on time and ready to rock

If you want to build a relationship of trust with the team, behave showing the example that you want the team to follow. That means, be present physically and mentally 100% of the time. Put your cell-phone, tablet and any potential distraction away, and be there for them. Be on time and respect your commitments no matter what they do. You want

them to see that something new is about to start happening, and that starts with you first showing what to do. Get ready to rock, which means be prepared to jump in and start helping them. It could be facilitating a conversation or just writing things in a board, just be ready to do what you love the most.

- o **Benefits**: By being present you show that you care about them, and people would appreciate that and that would help with building the relationship of trust. Being on time shows respect for the process, for the environment and for others people time. That would also help with building the relationship of trust with the team and would help them to follow and do the same. Being always ready to rock would demonstrate your disposition to help them when it's needed and that would create support and a baseline for a strong relationship of trust too.
- o **Potential risks:** Becoming impatient and try to fix people behaviour could diminish all your efforts and destroy what has been built in seconds. Be careful.

3. Iteration Planning

What is the Iteration Planning for?

It's the event for planning what the team has forecasted to complete for the customer by the end of the iteration. It's also the time for the team to set the iteration goal, and to discus and agree upon the iteration backlog.

When is the Iteration Planning held?

It's held at the beginning of the iteration.

Who Participates in the Iteration Planning and How?

Here is what I've found that works better for each role when participating in the iteration planning:

Role	Responsibilities
Product Owner	- Prepares the content of the top product backlog items with the help of the Scrum Master. - Explains what the iteration goal is to the team (It's nice to share the reasons behind the choice with the team). - Exposes and discusses its Product/Service wish list for the iteration. - Encourages collaboration between the stakeholders and the development team about the future of the product. - Listens carefully to what the team wants to say in terms of: o User stories dependencies; o Potential risks; o Potential road blocks; o Task complexity. - Is open to receive and give answers to the team about the content of the Product Backlog and its priorities. - Negotiates the final iteration commitment with the team. - Collaborates with the Scrum Master with creating a safe environment to increase collaboration, visibility and transparency.

Figure 9- Iteration Planning - Product Owner Role & Responsibilities

Role	Responsibilities
Scrum Master/Agile Coach	- Ensures that the event happens at the same time at the end of the iteration. - Facilitates collaboration between the Development Team, the Product Owner and Other Specialists in the room. - Creates a safe environment to contain the event and empowers collaboration. - Ensures that the meeting is structured and stays focused. - Identifies potential issues that are required to be addressed later and asks for responsible people before the meeting ends. - Ensures that meeting stays within the established time frame. - Coach/Mentor/Teach the Product Owner with writing the Iteration Goal. - Coach/Mentor/Teach the Development Team with splitting tasks in small chunks of work. - Coach/Mentor/Teach the Scrum Team on how to calculate the team's capacity. - Coach/Mentor/Teach the Development Team with deciding what to commit to and how to accomplish it.

Figure 10-Iteration Planning - Scrum Master/Agile Coach Role & Responsibilities

Role	Responsibilities
Development Team	- Challenges the Product Owner's wish list. - Raise concerns regarding potential issues that could get in the way of the team reaching the iteration goal. - Proposes solutions and provides expert technological advice to the Product Owner. - Collaborates to get the iteration planning completed. - Collaborates with updating the Definition of Done. - Grooms product backlog items as required. - Listens carefully what the Product Owner is saying about the Product Backlog. - Answers questions related to the iteration content. - Breaks down every single product backlog item into small tasks and assigns an estimate in hours to it. - Decides high level strategies to tackle the iteration.

Figure 11-Iteration Planning -Development Team Role & Responsibilities

What other techniques could be used to improve the Iteration Planning?

Structure your Iteration planning

Help the team by offering some kind of structure to work with during the Iteration Planning.

Keep the Product Backlog refined and groom often

This could help your team(s) to reduce waste during the iteration, and stay focused on what needs to be done.

In order to accomplish this you would:

1. Have **at least one two hour Product Backlog refinement session** per two weeks of iteration.
2. For the Scrum Master to help and support the Product Owner weekly regarding the content of the Product Backlog based on the Product Roadmap (At the very least, a high level vision of the upcoming three months of work).
3. **Use the Team's Roadmap template** to help you when assisting the Product Owner with setting Product Backlog priorities and make them visible for the team.
4. **Avoid being so rigid and purist about scrum practices**. Where people are involved, instead use and trust your common sense and even trust some of their ideas.
5. **Skip the ceremony on purpose**. Something that I sometimes do, is miss the beginning of the iteration planning, so the team can figure it out by themselves. The first time you do this, it would be awkward, but after some time the team will get used to it.
6. **Repeat, repeat and repeat**. Keep using these techniques until the team starts owning them.
7. **Have fun**. Enjoy what you do, talk with your team(s) about people's lives, what is happening around the world, and take the time to connect with them

Iteration Planning Template - Overview

Summary - Part A

Suggested Steps	
Purpose	**Techniques**
STEP 1 - Build Community	
Helps the team with creating the bond required to move on together	• Get the room prepared (Meeting agenda is visible to everybody in the room, everything is set) • Welcome the scrum team to the room, make them feel safe by saying good morning/afternoon • Ask an open ended powerful question to warm them up: i.e.: What's new in our lives? What about your weekend?
STEP 2 - Close Previous Iteration	
Helps the team with creating awareness about what happened previous iteration	• Ask permission to the team to go over previous iteration results, which means • Revise iteration burn down to validate how the iteration went and ask/tell the team to look for patterns that could lead the team to improve
W H Y / **W H A T**	• Ask the Product Owner to set its expectations for the iteration by establishing the main focus of it. • Ask the Product Owner to share the iteration goal with the development team • Help the development team challenge the Product Owner iteration goal by asking open ended questions
	• Be sure that everything in the backlog is ready to be planned. If there is something to be discussed, go for it. Ask the team if they feel OK to include the item into the iteration backlog and look for signs of confirmation: Check the team's behaviour and watch them to validate if that match their speech.
	• Ask the Product Owner to go over of the iteration wish list. • Open the floor for questions about why are we doing this wish list. Challenge priorities until the team gets common understanding • Remember: this is an iterative process, so you would get the team to do it step by step

Figure 12- Iteration Planning Template suggested steps - Part A

Summary - Part B

Suggested Steps	
Purpose	**Techniques**
Step 3 - Do we need a break before moving on?	
Helps with creating the step back to think mindset in the team	• Ask the team to include breaks in the agenda iteration planning agenda and then stick to it. • Make sure that it happens when planned.
Step 4 - Calculate Team's capacity [Iteration level]	
Establishes limits to help the team with focusing on what's possible to be delivered	• I do use team's median velocity and man hours to help team assess how accurate it's the amount of work that the team is committing to deliver. Here is a formula that could help you with calculating • Teams Capacity in hours for the iteration: • (#Workable Hours x day)*(#Workable Days of the iteration)*(#Workable Days x developer)*(#Developers working)
Step 5- Task breakdown	
It's the development team's time to discuss about how to do the job in order to reach the iteration goal	• Let the team break down every single item identified in the Product Owner Wish list in tasks (<=1 day. Duration). Ask the team to estimate how long it will take to complete each task in hours, in order to compare with the calculated Team Capacity in man hours. Once the team is done, challenge the iteration commitment comparing the amount of hours that team committed to do with the calculated team capacity. Do the same with the amount of Story Points that the team is committing to deliver and the median Velocity of the team.
Step 6 - Close the Iteration planning	
Helps the team give some visibility and be challenged about what's going to be delivered (the plan)	• Ask the development team to present to the Product Owner what would be the iteration commitment (what they are expecting to deliver by the end of the iteration). Ask if it make sense for everybody in the room, and verify with the Product Owner if the iteration backlog priorities are OK. Now the team is ready to start the iteration!

Figure 13- Iteration Planning Template suggested steps - Part B

Instructions

Before the meeting

1. Chose an empty board in the room where the iteration planning would be held
2. Create a personal kanban with three columns (To do, Discussing and Done) on it
3. In a Super sticky note (I like 4 in x 4 in), right down the **iteration planning template** suggested steps, one step sticky note.
4. Place all your super sticky note **iteration planning template** suggested steps, below the To-Do column of your personal kanban board.

During the meeting

1. Once the meeting has started, move into the "Discussing" column of your personal kanban board, the **iteration planning template** suggested step that is being discussed at the moment.
2. When the "Discussion" is done, move the **iteration planning template** suggested step to the "Done" column.
3. Repeat steps 1 and 2 until each **iteration planning template** step has been discussed.

Visual Instructions
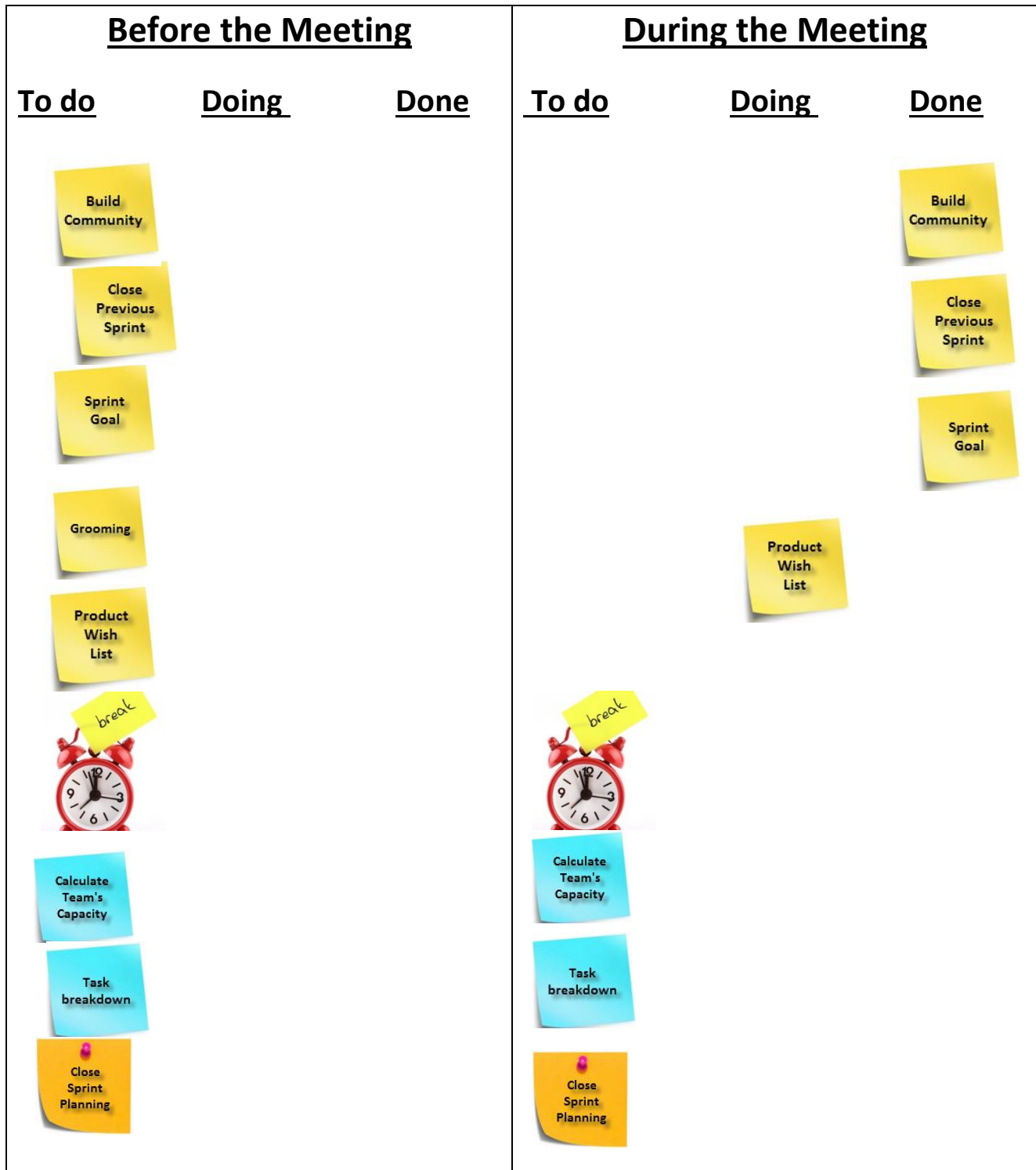
Figure 14-Visual Instructions Iteration Planning Template

Simple Explanation

The What & Why

✔	Main Steps	WHY
	Build Community	Helps establish the bond required to move forward as a unit.
	Close Previous Iteration	Create awareness about what happened during the previous iteration.
	Define/Set Iteration Goal	Iteration WHAT and WHY
	Product Backlog Grooming/Refining	
	Product Owner Wish List	
	Break Required	Helps with creating the step back to think mindset in the team
	Calculate Team's Capacity [Iteration level]	Establishes limits to help the team with focusing on what's possible to be delivered
	Task Breakdown	Development team time to discuss about how to do the job in order to reach the iteration goal
	Close the Iteration planning	Helps the team give some visibility and be challenged about what's going to be Delivered (the plan)

Figure 15- Iteration Planning Template - Simple Explanation

Detailed Explanation

The What & How

✔	Main Steps	Techniques
	Build Community	• Prepare room by ensuring all artifacts are clear and visible prior to the meeting • Welcome and thank the team Warm up the room by asking powerful open ended questions.
	Close Previous Iteration	• Close previous Iteration Review the team's previous iteration results with their permission
	Define/Set Iteration Goal	• Product Owner has established the iterations main focus and expectations • Product Owner to communicate/share the iterations main focus and expectations Development team to challenge/question (WHY?) the iterations main focus and expectations
	Product Backlog Grooming/Refining	• Review with team/PO that the backlog is ready to be planned. Must discuss and remove ambiguities. Validate with the team if they feel OK to include the item into the iteration backlog • Look for signs of confirmation (Body Language matches oral communication): Check the team's behaviour and watch them to validate if that match their speech.
	Product Owner Wish List	• The Product Owner to communicate the iterations wish list. The team to question about why we are doing that wish list. Challenge priorities until the team gets common understanding (Remember: this is an iterative process, so you would get the team to do it step by step) Pay attention to those teams that don't challenge as it might be, it could be a sign to take care after.
	Break Required	• Ask the team to include breaks in the agenda iteration planning agenda and then stick to it. Make sure that it happens when planned.

Figure 16 - Iteration Planning Template - Detailed Explanation Part 1

✔	Main Steps	Techniques
	Calculate Team's Capacity [Iteration level]	• Use the team's median velocity and man hours to help team assess how accurate it's the amount of work that the team is committing to deliver. Here is a formula that could help you with calculating Teams Capacity in hours for the iteration: (#Workable Hours x day)*(#Workable Days of the iteration)*(#Workable Days x developer)*(#Developers working)
	Task Breakdown	• Let the team break down every single item identified in the Product Owner Wish list in tasks • (<=1 day. Duration). Ask the team to estimate how long it will take to complete each task in hours, in order to compare with the calculated Team Capacity in man hours. Once the team is done, challenge the iteration commitment comparing the amount of hours that team committed to do with the calculated team capacity. Do the same with the amount of Story Points that the team will commit to deliver and the median Velocity of the team.
	Close the Iteration planning	• Ask the development team to present to the Product Owner what would be the iteration commitment (what they are expecting to deliver by the end of the iteration). • Ask if it make sense for everybody in the room, and verify with the Product Owner if the iteration backlog priorities are OK. Now the team is ready to start the iteration!

Figure 17- Iteration Planning Template - Detailed Explanation Part 2

7. Iteration Review

What is the iteration Review for?

It's the event held to inspect what was done for the customer during the iteration and to adapt the Product Backlog if needed.

When is the iteration Review held?

It's held at the end of the iteration.

Who participates in the iteration Review and how?

Here is what I've found that works better for each role when participating in the iteration review:

Role	Responsibilities

Product Owner	- Invites key Stakeholders to collaborate by participating in the meeting.
	- Explains what the iteration goal was (give some context to the audience).
	- Discloses high level results of the iteration in terms of:
	    o Forecasted user stories;
	    o Completed ("Done") user stories;
	    o Amount of unplanned items added to the iteration;
	    o Amount of bugs found;
	    o Amount of bugs fixed.
	- (If needed) Discloses high level project status in terms of:
	    o Current completion status (%);
	    o Projected completion date;
	    o Amount of iterations left to completion.
	- Discloses and discusses what's next in terms of the product:
	    o Potential capabilities.
	    o Encourages collaboration between the stakeholders and the development team about the future of the product.

Figure 18- Iteration Review - Product Owner Responsibilities

Role	Responsibilities
Development Team	- Updates audience about the issues, risks and improvements found during the iteration and its progress (and if, in any case, things that are not "Done"). - Demonstrates pieces of software considered "Done". - Answers questions related to the iteration content and the challenges faced.

Figure 19- Iteration Review - Development Team Responsibilities

Role	Responsibilities
Scrum Master/Agile Coach	- Ensures that the event happens at the same time and by the end of the iteration. - Facilitates collaboration between the Development Team, the Product Owner and the Stakeholders. - Creates a safe environment to contain the event and empowers collaboration. - Ensures that the meeting is structured and stays focused. - Identify potential issues that are required to be addressed later and asks for responsible people before the meeting ends. - Ensures that the meeting stays within the established time frame.

Figure 20- Iteration Review - Scrum Master/Agile Coach Responsibilities

Role	Responsibilities
Stakeholder(s)	- It's present to give feedback to the Scrum team about the product and the iteration. - Challenges the Product Owner about project status and what's next in the Product Backlog. - Encourages continuous improvement mindset by giving direct feedback to the Scrum team. - Challenges the Development Team about what was completed during the iteration. - Collaborates with the Scrum Master with creating a safe environment to increase collaboration, visibility and transparency.

Figure 21- Iteration Review - Stakeholder(s) Responsibilities

What other techniques could be used to improve the Iteration review?

Recurrent dry run meetings could be really helpful when getting ready for the iteration review. A dry run is a short meeting (for two week iteration, it takes less than (1) hour) where the Agile team meets to identify:

What's "Done"? How?

The Development Team will review, item by item, within the Iteration Backlog to show the Product Owner which acceptance criteria is done (If it wasn't done previously during the iteration).

From what's "Done"

Pick and choose the most important items to be demonstrated, based on what was defined in the Iteration goal. Why pick and choose? Depending on the audience, if the development team goes through everything that was done during the iteration, instead

of the 'pick and choose' criteria, sometimes the iteration review could be impacted in different ways.

Quick Updates
What's that?

All iteration backlog items considered not "Done" but whose progress is considerable enough that it's worthy to be demonstrated by the Development Team during the iteration review; in order to get feedback from the Stakeholders.

Why?
I've noticed that by not allowing the development team to present items considered not "Done" that they considered ready to be demonstrated, I was diminishing the power of short development cycles and feedback loops. Also it was causing frustration in the development team up to a point that it was generating a negative impact.

Some results after several try outs
By doing this we showed the team what it means to add visibility and to be transparent when practicing Scrum; in addition to encouraging them to explain and get things done before the end of the iteration.

What's next?
Ask the Product Owner to list everything that he/she considers will be part of the focus of the next iteration. It could be as simple as showing the next iteration goal and high level content to launch the conversation with the Stakeholders that would be present during the iteration review.
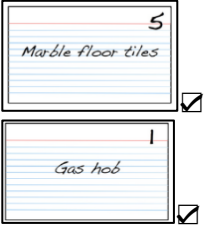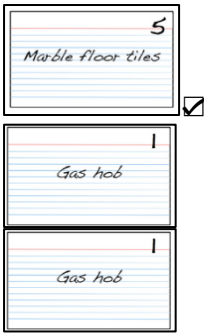
Iteration Review Templates
Use **the iteration review template** to help you when making preparations for facilitating, holding and tracking the iteration review.

Repeat, repeat and repeat
Keep using these techniques until the team starts to own them. Something that I often do is not attending the dry-run meetings on purpose, so the team can figure it out on their own. The first time it could be awkward for the team, but after that they will be able to get it.

Iteration Review Template – Overview

	1-Iteration Status	2-Things to Demo	3-Updates	4-What's next
I N S T R U C T I O N S	Invite the **Product Owner to** complete the section(s) listed below with the values available at the moment. **Project Status:** What is the status of the project? Where we are in Terms of project completion? How much iteration left for Project completion? Is the project on track regarding the original baseline? **A - Project completion %** [Stories Completed/Stories forecasted]: **B - # Iterations left for completion:** **C- Projected on budget:** [Yes / No] **D - Project on track** [Yes / No] **Iteration Goal:** Why is it worthwhile to run the iteration? What should be achieved? For instance, address a risk, test an assumption, or deliver a feature. **Forecasted items [Story Points]:** **Completed (Done) items [Story Points]:** **Not (Done) items [List]:** **# Unplanned items (Injections):** **Bugs fixed/founded ratio:** **Test Coverage %:** **# Rollbacks:**	Invite the **Development Team** to list here everything that's considered "Done" by the Product Owner and will be demonstrated by the Development team during the Iteration review	Invite the **Development team to l**ist here all iteration backlog items considered not "Done" whose progress is considerable enough, that's worthy to be demonstrated by the Development team during the iteration review, in order to get feedback from the stakeholders.	Invite the **Product Owner** to list here everything that he considered will be the iteration goal of the next iteration.
	2-Quick Updates			
	Invite the **Development Team** to list here everything that's considered "Done" by the Product Owner but just need a quick update. There is no Demonstration required			

	1-Iteration Status	2-Things to Demo	3-Updates	4-What's next
T I P S	**Keep it simple** Something that works for me, is to ask about those items available at the moment and be patient, the rest will come alone.	**Keeping track of the progress during the iteration review:** Something that works for me is showing that the iteration review is progressing by marking items from the list, once they are done. I do use markers or stickers to do that.	**Keeping track of the progress during the iteration review.** Something that works for me is showing that the iteration review is progressing by marking items from the list, once they are done. I do use markers or stickers to do that.	**Keep the communication open so then the Stakeholders can collaborate and exchange feedback to the Scrum Team** Something that had worked for me is to ask open ended questions once the Product Owner has presented the content of this section. Examples: • What do you think about what's next? • What about the priority? Is that accurate? • What else should we keep in consideration?

Figure 22 - Iteration Review Template overview

Instructions - Part A

During the Dry Run

1. Chose an empty board in the room where the iteration review would be held
2. In a Super sticky note (I like 4 in x 4 in), right down the iteration review template suggested steps, one step sticky note.
3. Place all your super sticky notes in the board, one per column
4. Filling the board, one column at a time:
   a. **Iteration Status**
      i. Invite the **Product Owner** to complete the section(s) **Project Status, Iteration Status** with the values available at the moment. For more details take a look to the Iteration Status section of the Iteration Review Template – Overall.
   b. **Things to Demo**
      i. Invite the **Development Team** to list here everything that's considered "**Done**" by the Product Owner and will be demonstrated by the Development team during the Iteration review.
      ii. Tip: Invite the team members to self-organize themselves by deciding who shows what.
   c. **Quick Update**

i. Invite the **Development Team** to list here, all iteration backlog items considered "**Done**" by the Product Owner and that the team considered important to share a quick update, in order to get feedback from the stakeholders.

   d. **Updates**
      i. Invite the **Development Team** to list here all iteration backlog items considered "**Not done**", whose progress is considerable enough, that's worthy to be demonstrated by the Development team during the iteration review, in order to get feedback from the stakeholders.

   e. **What's next**
      i. Invite the **Product Owner** to list here everything that he considered will be the iteration goal of the next iteration.

Instructions - Part B

During the Iteration Review

1. Remember that your role in this meeting is to facilitate it, so stick to it and give the team space to own it. Let them talk, and be there to support their journey.

2. If there are new people in the room, I like to take time to explain what the purpose of the meeting is and how things are going to happen.

3. Keep track of the meeting progress. When facilitating, it's important to show that the meeting is progressing, that things are moving along. In order to help with it, I use to gray out the items that have been discussed in the board, once the discussion has completed.

4. Ask questions to get people's opinions and feedback for the team. I love asking permission to the audience before considering an issue done and grayed out for example.

5. Once the meeting is done, invite the people present in the room to share their perceptions about the Team's Performance Satisfaction, using a [Team's Performance Satisfaction template](#).

6. Use Team's Performance Satisfaction results as an input to the iteration retrospective.

7. Have fun!

Visual Instructions – Part 1

Dry Run Outcome

Sprint Status

Forecast **20 SP**

Completed **22 SP**

#Injections **1 => 2SP**

Bug Fixing Ratio **½= 50%**

Bugs found = 2
Bugs fixed = 1

Things to Demo

As Peter the customer
I want a button to upload
Documents to my website
So then I can share it with
my colleges

Quick Updates

The user list was updated in
the main server

The DB server Operative
System patch #1.6.10
applied successfully

Updates (Not done)

As Carol the system
Administrator I want
an admin section to
update/remove/add
documents so then
Servers stay performing

What's next

Admin Tool

Reporting Tool

Figure 23- Iteration Review Template- Visual Instructions- Part 1

Visual Instructions – Part 2

During the meeting
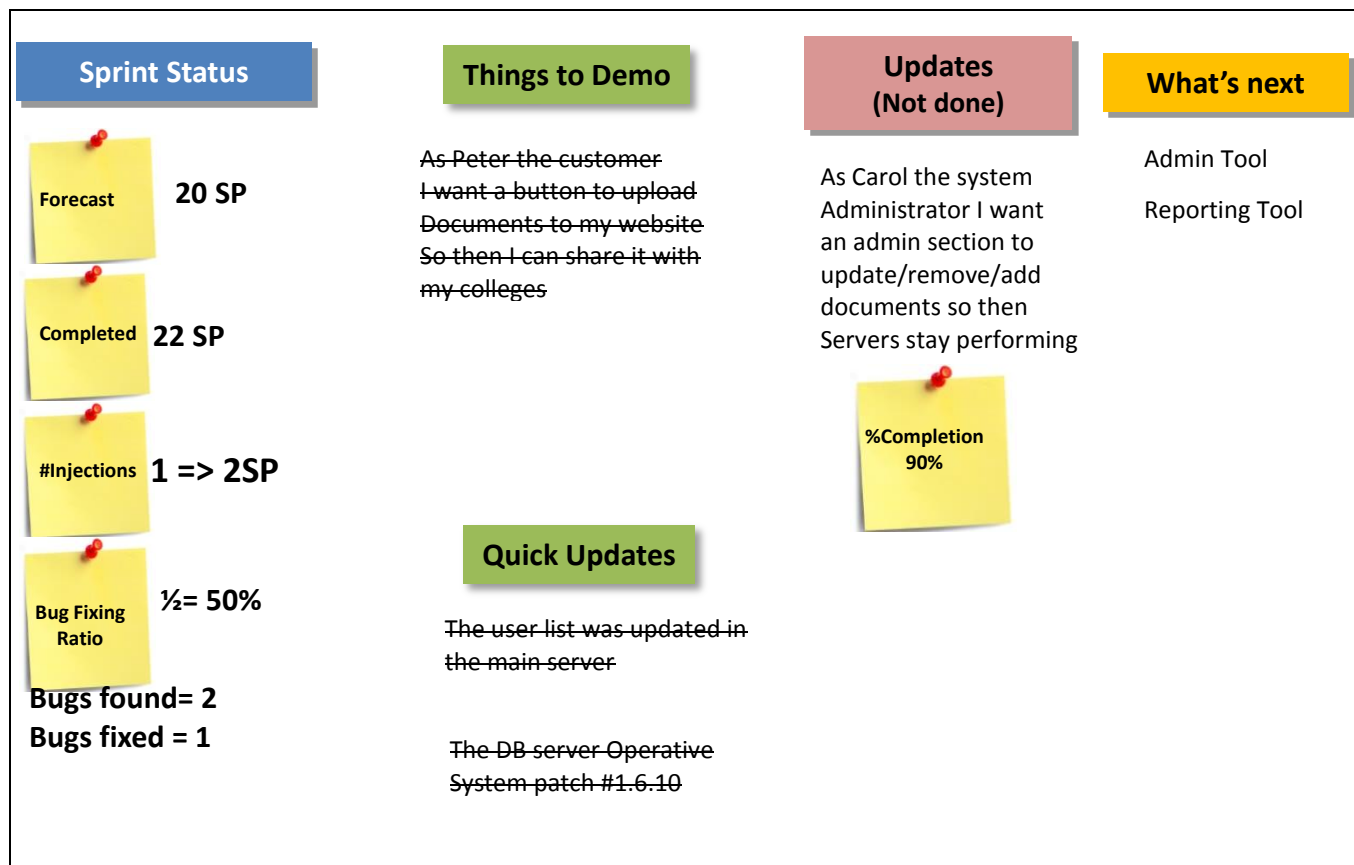
Figure 24- Iteration Review Template- Visual Instructions- Part 2

Simple Explanation

The What & Why

✔	Main Steps	WHY
	Iteration Status	● High level vision about what was done during the iteration ● Helps with setting the stage properly for the next step (The demonstration)
	Things To Demo	● Gives visibility about what was done during the iteration. ● Allows the team to get direct feedback the work that was done.
	Quick Updates	● Open the space for challenges and required conversations that would help the team to grow. ● Encourage self-organization and team ownership. ● Helps the team with taking responsibility about their work.
	Updates	● Helps the team to stay accountable and show things that are not done, but there is good progress. ● Offers the opportunity to pivot early by saving time and changing the scope of things that are visible before getting it done. **Tip:** I would ask the team (PO) to agree upon what are the criteria for a task to be considered as a quick update. Personally, my teams are using tasks that are more than 80% completed.
	What's Next	● Adds some transparency and visibility to what's next in the Product/Service pipeline. ● Opens the floor for Product Owners and the team to get challenged about what's next. ● Offers the team a chance to demonstrate that everybody is in the same page or not.

Figure 25- Iteration Review Template- Simple Explanation

Detailed Explanation

The What & How

✔	Main Steps	Techniques
	Iteration Status	● Prepare room by ensuring all artifacts are clear and visible prior to the meeting ● Once the meeting has started invite the Product Owner to take the lead and present the content of the column to the audience. **Tip:** Coach the Product Owner to keep it short and high level, remember that the star of this event is the Development team.
	Things To Demo	● Once the Product Owner has completed introducing the Iteration Status, is time for the development team to shine and show the things that were decided to be demo during the Dry Run meeting. ● Give the development team space to talk freely and own the presentation, by allowing them to speak. ● Avoid interrupting them, and once they have finished presenting each feature, invite the people in the room to collaborate with the team by sharing them constructive feedback about what was demonstrated. ● I like to gray out the feature in the board, as a visual sign that we are progressing with the meeting's agenda.
	Quick Updates	● Invite the development team to share with the audience, those Product Backlog Items considered "Done", which just require an update. No demonstration is required.
	Updates	● Invite the development team to make visible their progress about those things that were not completed within the iteration, but are close to completion. ● I like to invite my teams to share here, the Product Backlog item percentage of completion. That gives visibility to the audience and allows the team to get feedback during the early stages of their development process. I've notice that this helps with keeping teams motivation level elevated, because they feel that their efforts to get things done are worthy. ● Invite people in the people to share their feedback with

		the teams, and give space for conversations without losing the focus of the meeting.
	What's Next	● Invite the Product Owner to share what's next in the Product/Service pipeline. ● Allow the Product Owner to talk freely. Giving space by listening carefully will give the Product Owner self-confidence to drive the Product and show the team that he/her owns it. ● Start slowly closing the space. Observe when is the right time to intervene and invite people in the room to share their perceptions about the Team's Performance Satisfaction, using a Team's Performance Satisfaction template.

Figure 26- Iteration Review Template- Detailed Explanation

.

Team's Performance Satisfaction

What is the Team's Performance Satisfaction Template about?
The Team's Performance Satisfaction Template is a tool designed to collect people's opinion about their level of satisfaction of performance of a team during in a specific iteration.

When the Team's Performance Satisfaction Template is used?
It's mean to be used by the end of the iteration, after the iteration retrospective is over and before the next iteration is over. I prefer to keep it as a fixed event that occurs at the same time within the iteration, in order to turn it into a habit for the team.

What's the goal of the Team's Performance Satisfaction Template?
In my opinion, the main goal of the iteration retrospective is to create wisdom within the team by reflecting about the experiences to learn and continuously improve to get better results as soon as possible.

Team's Performance Satisfaction Template - Overview

	Participant	Team Performance Satisfaction	Results
I N S T R U C T I O N S	At the end of the iteration review, the Scrum Master invites each participant to assess how they feel about the performance of the team during the iteration by sticking the post-it with their name on it, over the face that represents their feeling.		Once the Iteration review is done and everybody have left the room, take a photo of the results, to use it when registering the results for further team performance reporting purposes. Once back in your desk, add each post it using the **value** assigned per each participant to each feeling. **Here is an example to help you calculate the "Team Satisfaction Score":** SAM = Very Happy => 5 Jim = Happy => 4 Joe = OK=> 3 Jose = Sad => 2 Mary = Happy => 4 Lyn = OK => 3
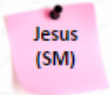
			Tim = Very Sad =>1 Lyn and John were on vacation **TSS= (5 + 4 + 3 + 2 + 4 + 3 + 1) / 7 = 3.14** **That means that the overall perception was rated OK**
Optional: Only if the team ask for it the Scrum Master could share its impressions too Jesus (SM)			
T I P S	1 - Prepare Post-its before the iteration review starts. 2- You could also ask participants to write specific feedback in their own post-it		You could calculate the **TSS** per profile in order to identify issues, trends on it. For example, add up only stakeholders and then create a trend chart to keep track of stakeholder's perception.

Figure 27- Team's Performance Satisfaction Template - overview

Instructions

By the end of the Iteration Review

1. Be sure that the Team's Performance Satisfaction Template is ready to be filled up, and that everybody in the room has a sticker ready to score the team.
2. Invite everybody in the room to share their opinions by rating their team satisfaction performance during the iteration that has ended.
3. Pay attention to get everyone participating by sharing its opinion through the board.
    a. If in any case, somebody doesn't want to share its opinion, let it go but then be curious to ask the reasons behind of it, you could be surprised.
4. If somebody scores 3 or less, I do ask the person to share verbally or at least write down in the post-it, what should be improved by the team to get a higher score next time.
5. Wait until everyone has expressed its opinion, and please remember: the team's opinion is really important. By exploring the reasons behind what the team has scored, you could get to undiscovered insights that could lead the team to figure potential issues.
6. Take a photo to keep track of it, it might be really useful to add visibility about how the team is being perceived within the company, increase team's moral, discover new perspectives, etc.

7. Keep the Team's Performance Satisfaction Template filled up and use it as an input to start the iteration retrospective.
8. Have fun!

Visual Instructions – Part 1

Before feedback is gathered

Figure 28- Team's Performance Satisfaction Template- Visual Instructions- Part 1

Visual Instructions – Part 2

After feedback is gathered

Figure 29- Team's Performance Satisfaction Template- Visual Instructions- Part 2

Simple Explanation
The What & Why

✔	Main Steps	WHY
	Invite People To Participate	● Enforces collaboration inside out the team. ● Fosters conversations and set the foundations for required trust within the organization. ● Fosters transparency and adds visibility to what the team is doing. ● Allows people to share opinions and removes organizational barriers
	Pay Attention To What's Being Said Or Not	● Shows that you and the team care about others opinion.
	Keep Track Of The Results Gathered	● In order to keep the mechanism a live, keep track of what's being said or not, would show them you care and that the feedback gathered is being used to do something.
	Take Results To The Next Level	● Helps with improving teams moral. ● Helps with improving how the team is perceived. ● Fosters trust and collaboration inside out the organization. ● Invites possibilities.

Figure 30- Team's Performance Satisfaction Template- Simple Explanation

Detailed Explanation

The What & How

✔	Main Steps	Techniques
	Invite People To Participate	At the beginning of the Iteration Planning and every time that a new participant joins the iteration review, take time to explain the reasons behind using this artifact to gather feedback. It will help them to share their opinions and be open to collaborate. Remember that this is an invitation, so be patient and let the people opt in and participate just when they want to. Repeat, repeat and repeat until iteration review participants get familiar with the mechanism. Remember that what matters is not the artifact itself, is to get people collaborating and exchanging. Encourager feedback.
	Pay Attention To What's Being Said Or Not	If somebody doesn't want to participate, let them go and then respectfully ask permission to hear the reasons behind that decision. Take care about what's being said through the artifact. I like to take a picture to the team's performance satisfaction template once has been completed, to further discussions with the team during the retrospective. I like also to do trend charts with Stakeholders results, and then make that information available to the team and then why not to the stakeholders.
	Keep Track Of The Results Gathered	I like to do trend charts with Stakeholders results, and then make that information available to the team and then why not to the stakeholders. Keep track of the comments that people has made in the post-its and share them with the team during the iteration retrospective. Perhaps that could be used as input for a potential action item that would help the team improve. Remember that when forming a team, you are there to make things stick to their minds, so keep your notes up to date and gather collected comments for future interventions.

Take Results To The Next Level	Use results to encourage the team to continue improving. I like to use the iteration report based on the Iteration Report Template, to discuss with the team how well or bad their performance has been perceived and what could be done in order to make the team better. Celebrate learning often. I like to invite the team to get lunch together or just to get an ice cream when all stakeholders have scored Very Happy for example. Remember, what matters are that we are learning by experimenting. Do the same when people is Scoring they are Very Sad. Stay positive.

Figure 31- Team's Performance Satisfaction Template- Detailed Explanation

After a Team's Performance Satisfaction is filled, what's possible?

Once the iteration review is done and stakeholders, product owner and development team have expressed their level of team's performance satisfaction of the iteration, there are several possibilities and benefits of using gathered information. Here is what I've found has worked for me. I hope that together, we will increase the following list to use it as a reference in the community:

Possibility	Techniques	Benefits
Evaluate satisfaction per profile (Stakeholder, Product Owner, Development Team)	- Keep track of team performance satisfaction score per iteration and build some trend charts. - Bring trend charts to the team during next iteration retrospective and use it as a mechanism to encourage continuous improvement.	- Creates team's self-awareness about stakeholder's perceptions. - Enables new collaboration channels between stakeholders and agile team. - Enforce transparency and help with building trust by having open conversations. - Reduces team's fear to be exposed and evaluated. - Motivates team to raise results level iteration after iteration. - Gives Scrum Masters/Agile Coaches/Line Managers facts

		for further conversations about team's performance.

Figure 32- Team's performance satisfaction – what's possible after

Possibility	Techniques	Benefits
Motivate the agile team to talk about results	Using the trend charts described above, invite the team to talk about it. I like to do that when closing the iteration at the iteration planning, it is quite impressive how engaging it could be for the team to see how others perceive them, and how powerful it feels when your work is appreciated by the rest of the organization.	- Puts smiles on people faces. - Enables necessary conversations within the agile team about results. - Helps with taking out of the conversation, the commonly used phrase "But they said this or that about us" with facts that could be carried on. - Improves long term results. - Enables openness to be criticized and judged.

Figure 33-- Team's performance satisfaction- what's possible after

Glossary

:: D

Development Team: the role within a Scrum Team accountable for managing, organizing and doing all development work required to create a releasable Increment of the product per iteration.

:: F

Forecast (of functionality): the selection of items from the Product Backlog a Development team deems feasible for implementation per Iteration.

:: I

Iteration: time-boxed event of 30 days, or less, that serves as a container for the other Scrum events and activities. Iterations are done consecutively, without intermediate gaps.

Iteration Backlog: an overview of the development work to realize the Iteration's goal, typically a forecast of functionality and the work needed to deliver that functionality.

Iteration Goal: a short expression of the purpose of a Iteration, often a business problem that is addressed. Functionality might be adjusted during the Iteration in order to achieve the Iteration Goal.

Iteration Planning: time-boxed event of 1 day, or less, to start the Iteration. It serves for the Scrum Team to inspect the work from the Product Backlog that's most valuable to be done next and design that work into Iteration backlog.

Iteration Retrospective: time-boxed event of 3 hours, or less, to end Iteration. It serves for the Scrum Team to inspect the past Iteration and plan for improvements to be enacted during the next Iteration.

Iteration Review: time-boxed event of 4 hours, or less, to conclude the development work of the Iteration. It serves for the Scrum Team and the stakeholders to inspect the Increment of product resulting from the Iteration assess the impact of the work

performed on overall progress and update the Product backlog in order to maximize the value of the next period.

:: P

Product Backlog: an ordered list of the work to be done in order to create, maintain and sustain a product.

Product Owner: the role in Scrum accountable for maximizing the value of a product, primarily by incrementally managing and expressing business and functional expectations for a product to the Development Team(s).

:: S

Scrum: a framework to support teams in complex product development. Scrum consists of Scrum Teams and their associated roles, events, artifacts, and rules, as defined in the Scrum GuideTM.

Scrum Master: the role within a Scrum Team accountable for guiding, coaching, teaching and assisting a Scrum Team and its environments in a proper understanding and use of Scrum.

Stakeholder: a person external to the Scrum Team with a specific interest in and knowledge of a product that is required for incremental discovery. Represented by the Product Owner and actively engaged with the Scrum Team at Iteration Review.

:: V

Velocity: an optional, but often used, indication of the average amount of Product Backlog turned into an Increment of product during the iteration by a Scrum Team, tracked by the Development Team for use within the Scrum Team.

Table of figures

Notes and references

Section: it's all done by Iterations

- From Agilealliance.org: Resource Guide, http://guide.agilealliance.org/guide/iteration.html
- Davies Rachel from AgileCoach.typead.com: Sprint vs iteration, http://agilecoach.typead.com/agile-coaching/2014/02/sprint-vs-iteration.html
- The Planning Game from Shore James web site: The planning game, http://www.jamesshore.com/Agile-Book/the_planning_game.html
- Mike Cohn web site: Differences between scrum and extreme programming, https://www.mountaingoatsoftware.com/blog/differences-between-scrum-and-extreme-programming
- Deming Cycle, PCDA http://www.isixsigma.com/dictionary/deming-cycle-pdca
- From The Manifesto for Agile Software Development: Principles behind the manifesto, http://www.agilemanifesto.org/principles.html

Section 1: Planning the team transformation process

- Scott W Ambler in his article Active Stakeholder Participation: An Agile Best Practice. (2013). Retrieved September 04, 2015, from Agile Modeling: http://agilemodeling.com/essays/activeStakeholderParticipation.htm
- Stakeholder categories are from Carl Kessler and Swetizer John book Outside-in Software Development, IBM Press, 2007
- The Arc of a Coaching Conversation inspired from Lyssa's Adkins version from her book Coaching Agile Teams was shared by Susan Johnston during hers Agile Coaching online course on December 2014.
- Maister, D. H., Green, C. H., & Galford, R. M. (2000). The Trusted Advisor. New York: Free Press

Stay in Touch

I'd love to hear about your journey and learn from your experiences. You can contact me at www.jesusmendez.ca where I'll be sharing ideas and best practices from Scrum Masters around the world. I invite you to join the team transformation conversation!

Via twitter I've created the hash tag [#TransformingTeams](#) to keep the conversation open. Also you can reach me directly by sending a message to [@chuzzete](#).

Let's connect via email too and change the world together. Just send an email to transformingteams@jesusmendez.ca. and I'll be more than happy to connect and collaborate with you.

What's next

This workbook is part of our agile teams from forming to performing series. Be the first to hear about new publications, special discount offers, exclusive articles, news and more! Get on the list for our e-newsletter by going to www.jesusmendez.ca

Upcoming Workbooks for Agile Teams

➔ Navigating Agile Teams through the Storm
➔ Norming Agile Teams
➔ Agile Teams, The Nirvana

We are grateful to the readers, authors and other friends who consider themselves part of the team transformation movement.