

Todd A. Jacobs

Scrum First Aid

*A Recipe Book for Fixing
Scrum Challenges and Anti-Patterns*

**5-Alarm
Scrum Disaster
in Progress**



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Scrum First Aid

A Recipe Book for Fixing Scrum Challenges and Anti-Patterns

Todd A. Jacobs

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This version was published on 2020-11-26



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Dedication

- **For my father Martin,**
who never understood what I do for a living, but who was proud of me anyway.
- **For my wife Kim,**
who supports everything I do.
- **For my son Avi,**
whose enthusiasm for new things encouraged me to write this book.

Epigraph

*Agility is the engine of modern business,
and automation is its fuel.*

— Todd A. Jacobs

Introduction

The [Scrum Guide](#)¹ is only 19 printed pages long, including cover pages, indexes, and *et cetera*. It also omits *any* mention of the roles and responsibilities of line management and senior leadership, focusing instead on a little theory and some essential details about framework events. This brevity often leads people to believe that Scrum is simple, or that implementing it is easy, and that it can be done without being embraced across the entire organization.

In the real world, I've seen non-agile organizations send a single representative of the team to collect a Scrum Master certification, rebrand a few line line managers as "Product Owners," and then tell a bunch of individual contributors that they are now part of a self-sufficient Scrum Team. What could possibly go wrong with that?

In these scenarios, the leadership team often sits back, confident that sprinkling the right agile buzzwords across the annual strategic plan has proactively fixed all the business problems they're facing. Everything will stay the same, only better! Things will move faster; quality will improve; time to market will drop; executive bonuses will roll in!

When adopting Lip-Service Agile™ or employing Buzzword ManagementSM fails, the blame is often laid at the feet of:

- a "wrong-headed" (rather than simply misimplemented) framework like Scrum;
- the "team" of random individual contributors who failed to become agile enough, fast enough;
- the Scrum Master who failed to hold the team *accountable* to management targets.

In almost all of these cases, improper application of framework principles, values, and roles is really the foundational problem. Failure to embrace Scrum at the senior leadership level (often called “tone at the top”) is a common comorbidity of a dead or dying Scrum implementation. In contrast, successful Scrum requires all hands on deck, all the way from the C-level down to the development team.

This book addresses a cross-section of common Scrum problems. Each chapter starts with a real-world problem an organization has applying Scrum to a concrete problem. Once the underlying problem has been identified, each chapter then suggests process improvements that will get things back on track.

As Fred Brooks famously argues in several publications, there is “no silver bullet.” Scrum is not a magic incantation that will fix organizational dysfunction, but it *is* a solid framework based on empirical control principles. This book will show you some concrete ways to apply those framework principles to the very real problems you face, and help teams and organizations struggling with Scrum to fix the *process* problems that are standing in the way of their success.

How to Read This Book

Pick Your Reading Style

The format of this book is like a box of chocolates. You don't have to eat the whole box all at once. While astute readers will find themes and core principles that run through the whole book, each chapter focuses on a single problem or set of circumstances that may apply to your situation.

Flipping through the index to find situations close to yours, and then reviewing the associated recommendations, is a great way to start. It's like having an agile coach in your pocket who can offer you advice on how others have solved similar problems.

Reading the book cover-to-cover is a good option, too. If you read the book this way, look for common themes and principles that you can add to your agile toolbox. Thematic items are called out as tips throughout the book, but a more thorough reading will reward you with a broader agile perspective.

Regardless of how you approach the book, the primary goal is to frame-shift from "Scrum as a set of arbitrary practices" to a process-oriented view that leverages the agile values and principles built into the Scrum framework to continuously improve *your* organization's processes.

There's no silver bullet. However, you're likely to discover that reframing Scrum implementation problems as process improvement opportunities is the next best thing.

Chapter Navigation

This book is split into two main sections to help readers find the material they need most.

1. Anti-Patterns

Each chapter in this section corresponds to a Scrum anti-pattern where practices are actively working against the success of the Scrum Team and the product development process.

2. Implementation Questions

The chapters in this section address common questions about how Scrum works, and how to leverage the framework to best advantage.

Within each chapter, you will find a number of tips, ideas, and warnings. These are indicated as follows:



This is a tip or key insight.



This is a warning that you should take to heart.



This is additional information you may find useful.

You will also encounter footnotes, endnotes, and reference links throughout each chapter, formatted appropriately for your ebook

reading device. These items are supporting information or clarifications that aren't important enough to disrupt the narrative flow, but that are often interesting enough to click on. Endnotes are also used to cite sources.

Anti-Patterns

This section will address common Scrum anti-patterns. Each chapter corresponds to a Scrum implementation where practices are actively working against the success of the Scrum Team and the product development process.

Daily Scrum as Status Pulls

Illustrative Example

For many teams new to Scrum, the [Daily Scrum](#)² is a core event that seems straightforward, but often presents numerous implementation problems when transitioning from a more traditional command-and-control process. An almost-universal challenge is differentiating between the Daily Scrum and a status report meeting. Here's a typical example.³



I'm a developer, and my team started using Scrum last year. It has been rough to say the least. I was always taught that the Daily Scrum was to discuss the following:

1. What you did yesterday.
2. What you are going to do today.
3. Any issues, challenges, or roadblocks that might be in the way at the moment.

My understanding is that this meeting is for developers, but Product Owners should be there to answer any questions that may be directed toward them. Otherwise, this is a meeting to go over developer needs and issues in a manner that is relaxed, and for the benefit of the developers (no one else).

In our version, each developer is required give what is tantamount to some kind of regimented status report. We stand up and report in the following format:

1. Story number and story name.
2. Each task number in the story that we worked on.
3. The original time estimate for the currently-discussed task.
4. The actual time estimate for the currently-discussed task.
5. An explanation of why we were over or under the original estimate.

We repeat this for each story and task in the current Sprint. Is this Scrum? Heck, is this even agile?

Analysis and Advice

When Daily Scrums Become Status Pulls

What is happening here is *not* an effective Scrum stand-up meeting; it's just a traditional status pull. In fact, it's probably worth dissecting this particular status pull to see why this particular "Scrum" process is failing. Two key elements that the project manager (not Scrum Master, evidently) is asking are:

- The original time estimate for the currently-discussed task.
- The actual time estimate for the currently-discussed task.

The only *practical* utility for this information is to determine whether estimates were on-target or not, or whether there are hidden process impediments that were not planned for in the original estimate. However, gathering this information in this particular way is not very agile because:

1. This information should already be transparent through the use of a Kanban board* or other framework process. Having to ask for it explicitly is a "project smell" that indicates a fundamentally broken project process or an undocumented objective.
2. Estimates are estimates, not commitments. As long as all stories that the team has voluntarily committed to perform during the Sprint are completed by the end of the Sprint, the individual story estimates (as opposed to the aggregate estimate) are not intrinsically useful except as part of a retrospective.

**Kanban* is a Japanese loanword that literally means "signboard." While the Scrum framework doesn't require the use of a kanban, its use has been widely adopted within the agile community because of its effectiveness as an "information radiator."

3. If the process is based on 100% utilization, rather than a throughput-based pull queue, then it's neither Scrum nor agile. All agile frameworks require slack in the process; asking for daily deltas at such a granular level certainly implies an intolerance for the slack *required* by agile frameworks.

Now, the last item is particularly telling. The project manager wants:

- An explanation of why we were over or under the original estimate.

Getting better at estimating is a useful goal for any agile framework. However, one goal of Scrum is to ensure that the team does not over-commit; if there is extra capacity within the Sprint once all stories are completed, then the team can and should pull additional stories into the Sprint from the Product Backlog.

The question, as described, sounds a lot like stories are being *assigned* to the team for each Sprint, which is an epic fail from a Scrum standpoint. Even if that's not actually the case, it's another project smell* that indicates that individuals are being "held accountable" (presumably by the PM) for the accuracy of individual story estimates, rather than for the team's overall progress in meeting the Sprint Goal for that iteration.

Misestimating is an issue that should always be communicated clearly during Sprint Reviews, and used as a learning process during the Sprint Retrospective. However, the *tone* of the question implies that accountability for estimates is more important than the work itself, and diverts the Scrum Team's focus from feature delivery to "C.Y.A. delivery."

*In agile software development, a *code smell* is an indicator that there may be a non-obvious problem that merits investigation. While a whiffy smell doesn't *prove* that there's a problem, it's an early warning that the team should take a closer look. It's such a useful metaphor that this book often applies the term "project smell" to indicate a process problem or framework anti-pattern that should be carefully explored and re-evaluated.

Using the Stand-Up to Coordinate Status

The following is partially correct, but misses the essence of what the Daily Scrum is for.

[The Daily Scrum] is a meeting to go over developer needs and issues in a manner that is relaxed, and for the benefit of the developers (no one else).

The Daily Scrum is a commitment and coordination meeting between members of the Development Team, but as an information radiator it can benefit the entire team. It's designed to ensure that the entire team is aware of impediments, what stories are done or not-done, and what tasks are ready to be pulled from one team member's to-do list into someone else's.

Despite being a meeting primarily for the developers, a Scrum Master or Product Owner can also gain value from the meeting. A well-run daily stand-up will give the Scrum Master a clear picture of any process issues that need attention, and whether individual stories are done or not-done. The Product Owner gains a sense of whether there are risks to the current Sprint Goal, timely insight into Backlog Refinement tasks for the next Sprint, and advance notice of when a Sprint might need to be terminated early.

It is often important that the Scrum Master and the Product Owner be present at the Daily Scrum, but primarily as *passive* participants. However, if the team is *reporting* to either of them, then the team is neither self-organized nor empowered to efficiently deliver value. Status-reporting to an authority figure during the Daily Scrum is definitely a framework anti-pattern, and one that deserves immediate attention.



The Scrum Master's role in the Daily Scrum is primarily to act as a process referee when necessary, although a little coaching and meeting facilitation may come with the territory during early phases of Scrum adoption.

The Product Owner's role in the meeting is as an on-demand resource, to clarify any questions the Development Team might have about the scope or intent of a Product Backlog item.

Your Process Might Be Broken If...

Here is a short list of “project smells” related to status-reporting issues. If any seem applicable, address them at the next [Sprint Retrospective](#)⁴.

1. If the team has so many stories on the board at once that a verbal report needs to identify the story by number, then the process is broken.
2. If the team has so many stories that a glance at the board doesn't make it clear that things are moving from not-done to done in a timely manner, then the process is broken.
3. If the team is so large that a glance at the board doesn't indicate who is working on what—or worse yet, requires cross-referencing with a separate spreadsheet—then the process is broken.
4. If the Product Owner's only communication about the project or with the team is at the daily stand-up, then the process is broken.
5. If the Scrum Master can't construct a burn-down chart from some combination of the story board, the daily stand-up, and ongoing communication with team members, then the process is broken.

6. If the Daily Scrum is not serving the needs of the team, then the process is broken.
7. If estimates encourage excuses or justifications rather than improved Sprint Planning techniques, then the process is broken.
8. If the team is reporting to any one individual during the Daily Scrum rather than cooperatively coordinating with one another, then the process is broken.
9. If your process is broken, but team members don't feel free to directly address the broken process during a Sprint Retrospective, then your organizational culture is broken.
10. If your organizational culture is broken, and figuring out *Who do we blame for breaking it?* is more important than figuring out *How do we collectively fix it?*, then it's time to dust off your resume.

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Todd A. Jacobs
November, 2020

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Velocity Measures/Forecasts Capacity

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Sprints Are Ephemeral

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Sprints Aren't Milestones

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Projects Evolve; Sprint Labels Shouldn’t

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Implementation Questions

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Notes

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Anti-Patterns

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2 <https://bit.ly/3904kdY>

3 Question adapted from a post by Prisoner ZERO, under a Creative Commons Attribution-ShareAlike 3.0 Unported license.

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