



# THE **AGILIST** **FIELD GUIDE**

*A GUIDE FOR ALL AGILISTS*

JM ROXAS

# The Agilist Field Guide

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# Contents

<b>Motivation</b> . . . . .	<b>1</b>
<b>What is agility?</b> . . . . .	<b>2</b>
Agility is about people . . . . .	2
Agility is about embracing change . . . . .	4
Agility is about outcomes . . . . .	4
<b>Daily stand-up</b> . . . . .	<b>6</b>
<b>Help! The participants in my stand up are distracted</b> . . . . .	<b>7</b>
The participants don't have a shared goal they're working towards . . . . .	7
The stand-up time is inconsistent . . . . .	7
The stand up is at the wrong time . . . . .	8
<b>Help! My stand up is way too long</b> . . . . .	<b>9</b>
There are too many in-depth discussions . . . . .	9
The participants are oversharing . . . . .	9
There are just too many people . . . . .	10
<b>Help! The stand up has turned into a progress report</b> . . . . .	<b>11</b>
You're stuck trying to answer the three questions . . . . .	11
You require everyone to have a turn . . . . .	11
There is an attention magnet in the room . . . . .	12
<b>Planning</b> . . . . .	<b>13</b>
<b>Help! Planning takes too long</b> . . . . .	<b>14</b>
You plan in too much detail . . . . .	14
Your planning session doesn't have a clear purpose . . . . .	14
<b>Help! We always overcommit</b> . . . . .	<b>15</b>
Not making all the work visible . . . . .	15
The team is frequently interrupted . . . . .	15
<b>Retrospectives</b> . . . . .	<b>16</b>
Retrospective happen at regular intervals . . . . .	16
The team reflects on how to be more effective . . . . .	16
Adjusting behavior accordingly . . . . .	16
<b>Help! My retrospectives lack participation</b> . . . . .	<b>17</b>

## CONTENTS

The team doesn't feel safe . . . . .	17
The retrospective is repetitive . . . . .	17
There isn't anything to talk about . . . . .	17
<b>Help! Our action items never get done . . . . .</b>	<b>18</b>
The action item doesn't have an action that can be tracked . . . . .	18
There is no clear driver . . . . .	18
You are out of your depth . . . . .	18
<b>Leading agile teams . . . . .</b>	<b>19</b>
<b>Help! The team does not feel safe . . . . .</b>	<b>20</b>
There are camps in your team . . . . .	20
Teams are not allowed to fail . . . . .	20
<b>Help! The team has stagnated . . . . .</b>	<b>21</b>
There is no spark . . . . .	21
There is fear that you cannot go back . . . . .	21
The team is experiencing change fatigue . . . . .	21
<b>Facilitation fundamentals . . . . .</b>	<b>22</b>
<b>Watch out for . . . . .</b>	<b>23</b>
The superstar crutch . . . . .	23
Projector interference . . . . .	23
Late Larry . . . . .	23
<b>The toolkit . . . . .</b>	<b>24</b>
Setup & Clean up discussions . . . . .	24
Doorknob discussions . . . . .	24
Blind voting activities . . . . .	24
<b>Acknowledgment, thanks, and references . . . . .</b>	<b>25</b>
References . . . . .	25

# Motivation

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# What is agility?

Many people define agility through the agile manifesto, the four statements within that and the twelve principles that go with it. In the context of creating software, I agree with those people wholeheartedly. What isn't popularly discussed is that software development is not an endeavor that happens on its own. It involves individuals working in teams, teams who are part of an organization and organizations who are filled with people who are responsible for what happens there.

Agility by my definition is a set of values and beliefs that drive a person's decision making. As the endeavor of creating software does not happen in a vacuum, my definition of agility cannot simply be constrained to just that. It goes beyond software development and extends to every aspect of work. Everything from day to day communications, long term planning all up to performance evaluations are shaped by the values we believe in. Anyone who shares these beliefs is an agilist.

It is often thought of that agile organizations are those who perform activities and ceremonies that are associated with the term. An organization's agile journey starts with a change in structure and renaming of roles. This is followed by the overhauling of processes and procedures to use more of the agile buzzwords. I disagree with that notion and believe that it is not the buzzwords or the practices that make an organization agile. Instead, it is having agilists at every level of the organization that makes it an agile one. With that agile transformation truly begins with the cultivation and education of agilists who exhibit these values in their day to day work and decision making. Change driven by these agilists, changes that keep the values at heart will result in ways of working that are agile regardless of how they are called. Indeed it is not the processes and terms used by the organization that makes them agile instead it is the people inside of the organizations that do.

My definition of agility is personal and has been established, refined and strengthened through my experiences. When I refer to agile values these are the ones being referred to. These statements that express what agility is about.

## Agility is about people

The first thing all agilists will agree on is that agility is about people or as the manifesto states "People and interaction over processes and tools.". Above that, it is seeing people as individuals each with their own hopes, dreams, and aspirations. It is understanding that people are naturally creative, messy and complex. Understanding that a single person's behavior is complex allows us to accept that groups of people such as teams would be much more so.

Being a team goes beyond being labeled as such. Teams truly become teams when they are aligned towards a common goal, one they can only achieve by working together. As part of working together, team members must interact with each other. They would be sharing their progress, knowledge along with the countless stories and topics they would share. Day by

day these team members gain more intimate knowledge and expertise with the work they do. Collectively they are able to gain a good understanding of the progress of their work and they also experience first hand all the pain points from their way of working. It is because they experience the pain points that they are inherently incentivized to do something about it. It is then up to those responsible for these teams to give them the support they need to be able to do so.

Autonomy in teams is often a tricky subject to talk about, a big factor to this is almost everyone has a different understanding of what the word means. For now, I'll be defining this as the ability of teams or individuals to make decisions within the allowed rules and parameters. By this definition, the people who allow others to be autonomous have the responsibility to create and explain those rules to those they are responsible for. It is then up to those who are given autonomy play within those rules, they are given space and freedom to create agreements and ways of working as long as those things do not go against the given rules.

This is similar to how basketball is defined by a set of rules, there are rules that are universally true no matter where you play basketball. Without these rules, we couldn't call the game being played as basketball. Yet as people play the game they come up with house rules, agreements that allow for them to enjoy the game more while still being within the rules of the game of basketball. House rules like "games are only played to a score of 21" and "the losing team is changed" allow the players to organize themselves and enjoy the game of basketball. For teams in organizations, it is the same thing those who have authority define the rules of the game and those who play the game are the ones who make house rules within the game.

Organizations are often compared to complicated machines with many moving parts and gears. This complicated machine is then broken down into smaller parts which could be called departments, these departments into teams and these teams into individuals. Structurally this makes sense as an organization is, in essence, a sum of all its parts. What I disagree with is the assumption that an organization and its parts function as predictably as a machine. That assumption is a dangerous one and ignores the human component of work.

In sports, it is a well-accepted truth that chemistry is an intangible that affects the performance of teams. We have terms like the glue guy or the heart of a team, people whose contributions go beyond what can be in the statistics of the game. Those people who through their interaction with their teammates elevate their level of play and motivate them to achieve more. This isn't true for machines, there is no gear that by its presence allows other gears to do more. It is simply a gear nothing more nothing less. This allows for parts and gears to be removed and replaced without any thought. This is not true for humans and teams. People who work in teams have shared experiences and ways of working, they've established safety with each other and when one team member is changed for another all of that takes a step back. This is part of the danger when organizations forget they are working with humans and not machines.

This illusion of predictability is not only a danger when it comes to moving members of teams around but also when trying to increase performance. If it takes a machine an hour grind 50 rocks surely two machines could get it done in 25 minutes. If a software developer can finish this story in a day then two developers can get it done in half a day. The illusion of predictability that comes from the machine analogy makes statements like that seem logical when we those who do the work know that it simply doesn't work that way.

Embracing the notion that agility is about people goes beyond valuing and accepting them as individuals and humans. It extends to accepting the complexity and uncertainty that humans

bring and to see them for what they are humans and not machines. They are not simple machines that can be tuned or optimized. Instead, they are individuals who need a system of support and nourishment in order to succeed. It is in accepting those things that we are able to give teams and individuals the freedom to experiment, grow and bring the best out of themselves and others.

## **Agility is about embracing change**

There is a popular saying that says change is the only constant and that is something I agree with. In our workplace, a process that has been considered to be the best practice or the only practice could quickly become an old outdated practice that no longer makes sense. When this happens it doesn't mean that it has failed or it was a bad idea, it simply means that it has run its course. Processes, rules, standards and all bureaucracy that we create exist in order to bring order to an otherwise chaotic system. All of these are created at a specific moment in time when this was the best course of action. What is needed now is to examine what has changed since then and what should be done about it. It is in creating that awareness into how and why these things were created that will allow us to discern when to make changes to them. That awareness coupled with the willingness and ability to affect change is at the heart of agility.

Mike Tyson famously said that everyone has a plan until they get punched in the face. Traditionally plans are created to avoid getting punched in the face, we make plans and hope they never fail. Plans are meticulously done and all possibilities are accounted for. Measure twice cut once as they used to say. A possibility back in the times when changes to the world were slow and gradual when news had to wait until tomorrow's newspaper was written and next month's issue of a magazine was published. Today news gets shared minutes after it occurs and magazines are considered a thing of the past. Punches to the face are almost guaranteed, the world changes too fast for us to be able to plan for every eventuality. The focus now shifts from not getting hit to how well do you take a hit. Would you be able to change your game plan after getting clocked or would you continue hoping that it doesn't happen again?

Agility shifts focus from compliance and enforcement of plans to awareness of situations and understanding of desired outcomes. As the world rapidly changes so does context in which the plan was originally formulated, so now we must ask if executing the plan would still yield the same outcome that was intended. By constantly inspecting the current situation then adapting our plan to achieve our expected outcomes it brings about the need for people who do not simply execute plans but also those who can think on their feet and adapt to the circumstances at hand.

## **Agility is about outcomes**

Outcome refers to the intended result. When a programmer spends an hour writing code the intended result is not to have 100 lines of code but instead to have a feature that can be tested and verified. Outcome refers to what happens in the real world because of what we've done.

Outcomes are what leaders and directors are responsible for. It is up to them to express outcomes and goals into clear messages that would inspire others to follow. Having clear and well thought of outcomes are what allows those in their care to be able to organize themselves in order to achieve those goals.



Take for example a company that aims to improve their bottom line by 5% for the year. One business head may focus on reducing its operating costs and how they can do more with less and another business head focuses on introducing new features to their platform.

Those working on reducing operating costs could look into automating processes or investing in new tools to streamline the work while those introducing new features can focus on attracting new customers instead of small improvements for the existing ones. What is key here is creating clear expectations the rules around it then allowing those closest to the work to come up with ways to get there and how to execute. For the business heads, the question was simply how could they improve the bottom line. For those in their care, the question is different for one it's "How could we reduce operating cost to improve the bottom line" and for the other it's "How do we generate more revenue?". These become guiding questions for those doing the work, it gives the work being done purpose and direction. When a new feature is introduced is it because it is cool or is it because it'll attract a big client? When we introduce automation to a new process is it to prevent the costly mistakes of manual processing or simply to because everyone is doing it?

In software, we have concepts like user stories that are used to tell a story about something that needs to be done. Oftentimes it is thought of as a pattern for writing requirements, it's not. What it is is a way to facilitate conversations about the intended outcome that is desired. In sharing the outcome instead of how to get there we honor the belief that the collective experiences and skills of the people doing the work will lead us to the best way of getting there.

When discussing organizing for outcomes the concept of cross-functional teams will often come up. This is because when teams self organize they will often find that reducing dependencies is often a good way of working which leads to them pulling in specialists to be part of their team. That though is only the first step. When the focus is placed on the intended outcomes instead of individual measurements those in the team start to step out of their expertise to help out in any way they can. This leads to specialists who develop into T-shaped individuals who are capable of taking in a variety of work that can help their team without losing their own specialized skills. A team that is composed of individuals like that is able to handle a more diverse set of challenges and problems compared to one that is strictly composed of specialists.

It is through focusing on the outcomes that teams and individuals that we honor our belief in people and their abilities. It gives them something to use as a goal for when they self organize and through their self-organization they take ownership of their work and its outcomes leading them to do their best. Beyond that, it asks that our leaders and managers not only express outcomes clearly but also nurture a way of working that allows teams to focus on their outcomes.

# Daily stand-up

The most common and misunderstood practice is the stand-up or the daily scrum as Scrum practitioners call it. To those who have good stand-ups, it is a quick way to stay in sync and be ready for the rest of their workday. To those who have poor ones, it is an awkward minute of talking in between 10 minutes of awkwardly standing around.

Understanding the intent of stand-up is key to getting the most value out of it. At its core, it is a catch-up, a chance for the team to check in with each other and make adjustments towards a common goal. The stand-up happens every day as it assumes that between yesterday and today there is something that the team would be interested in talking about. It is done at the same place and time so it becomes a habit, a part of the way the team works. It reinforces the value that face to face communication is the best way of sharing information. It is done standing up as it assumes the team would finish quickly. All of this is done for the benefit of the team.

One analogy I often use is to think of a 30-second timeout in basketball, in a time out we don't discuss each member's individual performance. We don't call a timeout to talk about how many points someone scored or how many rebounds someone pulled down. What we do discuss is what is going on in the game and what we're going to do about it. We talk about the changes to the enemy's strategy that we should adjust to or defensive breakdowns we've had and how we should fix it. Scoring points is important in a basketball game and it is understood that everyone is trying to score points. What is more important is we talk about how we can score points easier or what is stopping us from scoring points. The stand up is very similar in that regard. It is understood that everyone is doing their part to deliver software, regardless of their role in the way we work it is understood that everyone is doing their part so it isn't as important for us to talk about it. What is important for us to talk about is how are we progressing towards our shared goal. In our basketball analogy, the shared goal is to win the game by scoring more points than the other team, in software delivery that typically means complete our work in time for the end of an iteration or release. Equally important is for us to talk about the things our teammates can do to help us out. Last would be to talk about changes that are happening that could potentially stop us from reaching our shared goal.

With that being said we can summarize the stand up as a short activity that happens at the same time and place every day to talk about our work towards a common goal, changes that are happening and how we'll be dealing with it. In the next sections, we'll go over some problems teams face when trying to have a good stand up.

# **Help! The participants in my stand up are distracted**

It is fairly easy to see when people are distracted. Symptoms include people checking on their phones, zoning out or needing to have their attention called when being spoken to. Oftentimes when this happens the knee jerk reaction is to change the mechanics of how stand-up works or to introduce some form of novelty or twist. There is value in doing those things but before actions like that are taken there should be consideration made towards other factors that could be affecting a stand-up. Here are some things that should first be considered.

## **The participants don't have a shared goal they're working towards**

A shared goal is something that each member is determined to do but cannot achieve on their own. This is important as it incentivizes each member to share what's going on and find out what the other people are doing. This creates the need for awareness between team members and the factors that go into their work and way of working. If a team member would be able to complete their goals on their own then for that person there is no need to be aware of what the others are doing. Without the need to know this team member can fall into apathy and disinterest as the discussions going on at stand-up would not be valuable for that person.

This is a good chance to do two things, first is to go over the composition of the team and evaluate if the right people are invited to the stand-up. Do the people who go to the stand-up share a common goal? If the answer is no then strongly consider if they should be there or at least if they should be at every stand-up.

Second is to look evaluate the goals that are the team is working towards. Is the team aware of it? Do they even have one? It is clear and expressive? Goals give teams purpose and direction and having one is a prerequisite to having stand-ups.

## **The stand-up time is inconsistent**

This doesn't seem like an obvious reason for why people are distracted but it is very common. Too many teams fall into a trap of "let's do it when everyone is here!" or stand up is rescheduled because "something came up" for someone. Creating software is creative work that requires bursts of focus from those doing it. Having a consistent time allows people to be mentally prepared, this also means they don't "get in the zone" right before stand up because they know it is coming their way. When the time is inconsistent there is the risk that people are getting into their zone then are pulled away to go to stand up. This leads to them thinking about their work and not focusing on the stand up leaving them distracted.

The remedy for this is simple which is to keep the stand-up time consistent which people often find is easier said than done. Begin with having the team take control of their stand-up time make the time of the stand-up an agreement that everyone is amenable towards. This allows people to make sure stand-up isn't a distraction during their focused time. Part of agreeing to a particular time is also giving everyone an equal stake in the stand-up. When someone wants to reschedule the stand-up it would then require buy-in from all the members of the team. Last would be to agree to have the stand-up even if the team isn't complete. This shifts the expectation that the team will have to adjust for that one person who wants to reschedule to that person who wants to reschedule now has the responsibility to catch up with everyone.

## **The stand up is at the wrong time**

Most teams have their stand up in the morning because it is the start of the day kind of thing. That isn't true for everyone as some teams have it later in the day and this is when it gets a bit more tricky. There is no magic time that would work for everyone but there are some times which you generally want to avoid such as right before lunch or right before everyone goes home for the day. Times like this encourage people to "get it over quick" or have the focus on the thing that happens right after stand-up, either of those isn't ideal. There is also the possibility of having stand up time right in the middle of someone's in the zone time.

Aside from avoiding the typical not-so-good times teams should have an open conversation about if the time they've chosen for stand up is at a bad time. Also remember that as team members and projects change so does the ideal time for stand up, so living by the mantra of inspect and adapt; stand-up time should also be subject to scrutiny and adaption. Like with the suggestion for keeping stand-up time consistent the same is true for picking the stand up time. It should be an agreement of the whole team as to which time they think is the best for them.

# **Help! My stand up is way too long**

One of the key things about stand up is to should be reasonably quick. Hence stand up because it is long enough that you'd be comfortable having the discussion standing up. Sometimes though that isn't true and having a stand up run too long can be disruptive to the flow of your day or end up not being a good use of time for the participants. Let's go over possible reasons why it could be taking too long.

## **There are too many in-depth discussions**

This commonly happens when someone mentions a problem or a situation where they need help with something then the stand up suddenly shifts from a stand up to trying to solve that problem. Situations like this become tricky to maneuver because on one hand you have a team that is eager to help each other out and on the other, you have people who are not really part of the problem solving just standing around awkwardly waiting for the stand up to continue.

One way to deal with this is to call out that this a good candidate for a sidebar discussion and then after the stand up is done I remind them if they want to continue the sidebar. In cases where multiple sidebar discussions happen, they are resolved one after another at the end of a stand-up. Doing it at the end of a stand up allows those who are no longer interested in the sidebar to go on their merry way.

## **The participants are oversharing**

Another common issue is those who feel the need to itemize everything they've done in the past day. By everything I mean those who share that they went to a certain meeting even though everyone else in the room was also in that meeting. There are those who like to go into details about how they solved a certain story or task or some who just like to share in general.

In times like this, it is important to go back into the intent of the stand-up. It is not to have a status report of what happened but to talk about our work towards a common goal. One trick to get people to focus on this would be to have framing questions like "What else do we need to focus on so we can reach our goal?" or "How are you helping us get closer to the goal?".

Team members who overshare could also be an indicator of another issue in the way people work. When people feel the need to "justify" their existence or value to the team or the company there is a tendency to try to appear very busy or important. If this is the case it is important to look into why this perception exists as it could be symptomatic of an even bigger issue.

## **There are just too many people**

No matter how well facilitated a stand up is if there are twenty participants who all have something to say then it'll take a while. There are many recommendations as to what the ideal team size is and most have agreed that it is between 5 and 9 people.

A common practice to split up a team into sub-teams if they don't have a shared purpose or goal. While there are alternatives like having a split stand up which breaks down a stand up into subgroups and then having a stand up of stand-ups (or scrum of scrums in Scrum terms) it really begs the question of whether this stand-up is valuable to everyone in it.

# Help! The stand up has turned into a progress report

Unfortunately, the daily stand up turning into a daily progress report happens too often to too many teams. One telltale sign of this is when a stand-up looks like a firing squad. Everyone is stiff and tense. When someone finally says something they are typically heard from once and never again. There could be many reasons as to why this is happening so let's get into it.

## You're stuck trying to answer the three questions

Arguably the most popular way of introducing the stand up to teams goes like this "It's a quick meeting where you have to answer the following. What did you do yesterday? What are you going to do today? Do you have any blockers?". What is missing from this is why we're doing stand-up. There is nothing inherently wrong with the three guide questions of stand up as long as they are answered in the context of the shared goal of a team. A more descriptive version of the three questions would be "How did you contribute to our goal yesterday?", "How do you intend to help us reach our goal today?" and last would be "Are there any blockers?".

I believe that there is a place for the three questions in a stand up as long as they are answered in the context of the team's shared goal. When it becomes troublesome is when the three questions become a prescription and those coming into the stand-up only go there to be able to answer the three questions.

Walking the board is another popular method of avoiding the pitfalls of the three questions. This approach is the one where teams gather around their task board and go over the items being worked on. In this approach, there is focus on the work being done and the progress of the team. As the discussion revolves around the items on the board instead of the individual members there isn't an opportunity to bring up answers to the three questions.

Regardless of what the mechanics of the stand-up are it is important to make it known that the three questions are not a rule that needs to be followed and instead reaffirm the intent of the stand-up so that the members can figure out what is valuable to share.

## You require everyone to have a turn

There is a notion that stand-up is your chance to show everyone what you've done and by not saying something or having a turn during stand up it is the same as doing nothing. This is something I don't subscribe to. When stand-ups are facilitated by calling each member out it implies that everyone has to say something.

When team members collaborate towards a shared goal it is not uncommon for them to jump onto each other's train of thought to provide a clear picture of what's going on. A good example of

this is when someone starts talking about something they did then someone starts to add in what they did to help etc. When this happens it is common for someone to have shared everything they need to share without needing a turn and when that happens it is perfectly okay to not have time dedicated just so that one person says what they've already said. Stand-ups like this are healthy and it should be pointed out by those facilitating that this is all well and good.

For those facilitating the stand up find ways to end the stand up without having to single people out. The concern for most is that they have to single people out just to make sure they get a chance to talk but doing so makes it more uncomfortable for the person being singled out. People who are unable to share at stand-up is something that definitely needs to be addressed but it is more a matter of creating safety within the team rather than requiring them to have a turn.

Stand-up is a chance for the team to catch up. It is an open invitation that gives everyone in the team a chance to share what has been going on to the rest of the team. While everyone has that chance it would be their discretion as to whether they want to use it or not.

## **There is an attention magnet in the room**

In all organizations, there are people who whether intentionally or unintentionally attract attention like a magnet. Sometimes this could be a manager or a team lead, sometimes it is the person who is supposed to facilitate the stand-up. It is a tale as old as time that when a stand up happens there is a manager or an authority figure in the room everyone starts to talk as if they're reporting to that manager. This is especially true if the team or someone from the team used to report to that person. Another common scenario is that the person who introduced the stand up to the team is there to facilitate and everyone looks at that facilitator to keep the flow going or to see if "they did it right".

The obvious thing most people do is to remove the attention magnet, without the attention magnet being physically present people start to relax and focus on having a valuable stand up. Removing a person from a stand up isn't always ideal especially if that person is part of the team and the team's shared goal. When this happens one way to work around this is to make it difficult to focus on the attention magnet. One activity to try is to have a token being passed around by the team. This puts focus on the person speaking and the subsequent passing and catching of the token rather than a single person.

As a facilitator when I notice that a person is focusing on speaking to me instead of the team I simply walk and stand behind the person who is talking. That person now has a choice, does he turn his back to the team to speak to me or does he now have to look the other team members in the eye and start talking in their direction?

Another change people do is to change the mechanics of the stand-up so they focus on the task board. They do this through techniques like walking the board. Regardless of how the stand-up works there are ways in which it can be tweaked to make it difficult to focus on the attention magnet. It would then be up to the teams to try out which change works for them.



# Planning

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# Help! Planning takes too long

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## You plan in too much detail

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## Your planning session doesn't have a clear purpose

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# **Help! We always overcommit**

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## **Not making all the work visible**

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## **The team is frequently interrupted**

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## Retrospective happen at regular intervals

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## The team reflects on how to be more effective

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## Adjusting behavior accordingly

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# **Help! My retrospectives lack participation**

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## **The team doesn't feel safe**

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## **The retrospective is repetitive**

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## **There isn't anything to talk about**

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# **Help! Our action items never get done**

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# **The action item doesn't have an action that can be tracked**

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# **There is no clear driver**

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# **You are out of your depth**

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# Leading agile teams

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# **Help! The team does not feel safe**

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## **There are camps in your team**

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## **Teams are not allowed to fail**

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# **Help! The team has stagnated**

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## **There is no spark**

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## **There is fear that you cannot go back**

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## **The team is experiencing change fatigue**

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# Facilitation fundamentals

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# Watch out for

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## The superstar crutch

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## Projector interference

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## Late Larry

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# The toolkit

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## Setup & Clean up discussions

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## Doorknob discussions

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## Blind voting activities

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