THE STAGES OF SCRUM MASTERY

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Noel Burch, a psychologist created a learning model to describe how humans go through four stages of learning when introduced to a new skill.

When it's about learning new skills, we go through different emotions during the overall learning process. When it starts, we can't realize the importance of learning and how much to learn. We tend to feel disheartened, and we even give up when we realize that we don't possess sufficient knowledge to learn the subject. When we realize our feelings at every step of the learning process, we stick with it while managing and controlling the emotional turmoil that bubbles inside our hearts and minds.[1]

In this whitepaper, I am going to share my own journey as a Scrum Master from Information Dispenser to servant-leader. I have interviewed many Scrum Masters and have trained over 1000 professionals in my career. Based on my experience, coupled with the practical examples I have had in my career, I think many Scrum Masters may pass over the stages discussed in this paper.

I don't want you to consider these stages as stage gates, instead, take it as a stepping-stone for you to move toward servant-leadership.

Martin M. Broadwell's "The Four Stages of Competence" are documented on Wikipedia as follows[2]:

- **Unconscious incompetence:** The individual does not have enough knowledge to understand something and recognize their deficit. They may deny the usefulness of the skill. The individual must recognize their own incompetence, and the value of the new skill, before moving on to the next stage. The amount of time an individual spends in this stage of learning depends on the stimulus to learn.

- **Conscious incompetence:** Though the individual is unaware of how to understand something, they can very well recognize the deficit and importance of developing a new skill. At this particular stage, making mistakes is an integral part of the learning process. Our minds are now aware of the fact that we are at the beginning of a long learning curve.

- **Conscious competence:** Though the individual is aware of doing things, demonstrating the skills need concentration. It is broken down into steps, thereby having conscious involvement in executing the new skill.

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[1] The Conscious Competence Ladder: Developing Awareness of Your Skill Levels. (n.d.). Retrieved April 23, 2020, from **https://www.mindtools.com/pages/article/newISS_96.htm**

[2] Four Stages of Competence. (2009, May 30). Retrieved April 23, 2020, from **https://en.wikipedia.org/wiki/Four_stages_of_competence**

- **Unconscious competence:** The individual has adapted to the new skill on account of constant practice and efforts. It has become "second" nature and it can be performed naturally. The individual is capable of teaching the skill to others, based on how and when it was learned. This auto-response allows an individual to enter in an absorbed, thoughtless state, often called "in the zone" or "in the flow."

Figure 1. The "Four Stages of Learning" (Attribution: Noel Burch)
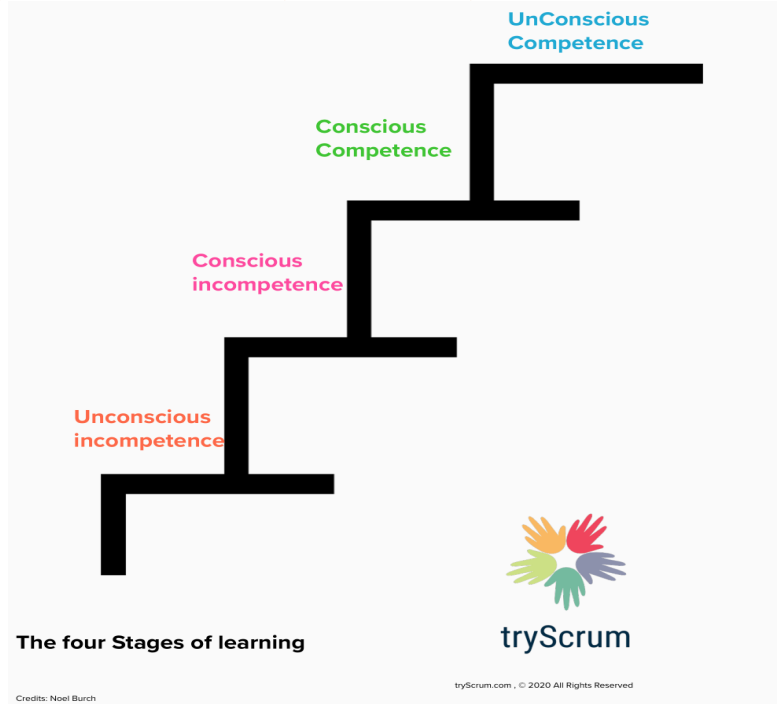
I have learned that there is a good correlation between the Four Stages of Learning and the stages of Scrum Mastery. In this paper, I have tried to demonstrate how some of the behaviors of the Scrum Master block their shift to servant-leadership. In doing so, I have described the need for recognizing what stage we are in. It is my conviction that Scrum Masters will benefit by gaining insight to inspect and adapt their style.

When I look back on my early days as a newly minted Scrum Master in 2013, I certainly enjoyed the opportunity, even though there was little information available on how to become an effective Scrum Master. Even though I was calling myself a Scrum Master, there is a clear difference between "calling" and "being."

I am writing this whitepaper from the perspective of the Conscious Competence quadrant. It contains my personal experiences as a Scrum Master along with some of my research work. In my view, no one is going to stay in one of these quadrants nor move sequentially.

The strategy allows Scrum Masters to know how many team members there are, gauge all the variables in their workplace and select an appropriate Situational Leadership approach

that perfectly fits their objectives and situations.[3] But, it is worth reflecting on which quadrant you are spending most of your time in.

I have used the analogy of the Four Stages of Learning to help Scrum Masters move from being information dispenser to a servant-leader.

The Paradigm Shift

Our world is a complex one. It's safe to say that, as Ted Bililies puts it, "Over the past decade, the half-life of knowledge and technology has plummeted. The world economy has turned out to be an interconnected house of cards, and destabilizing factors – from economic inequality to health epidemics to terrorism – have shaken up all sectors of society."[4]

Gunther Verheyen did a great job of explaining Scrum. As per Gunther, "Scrum is increasingly being discovered as a simple framework to address complex problems and situations other than software and product development. More and different people, teams and organizations ask for guidance and support on their journey of Scrum, no matter the nature of their problem."[5]

At its core, Scrum aims to unleash the power and intelligence of self-organizing teams who take responsibility to deliver value to their customers. These teams do not magically appear, but are enabled and nurtured by Scrum Masters that are servant-leaders for the Scrum Teams.

In my experience, the journey to becoming a servant-leader requires passion, dedication, and commitment. This requires, first and foremost, a mindset shift. You should be prepared to unlearn and relearn all as part of a journey.

If you ask me if you will be able to transition from Unconscious Incompetence to Unconscious Competence, my answer depends on how open you are to learn from your mistakes, make conscious efforts to expand your repertoire, acquire new skills, and be open to feedback.

I am not saying every Scrum Master will go through these stages. But, in my experience, the majority of Scrum Masters do.

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[3] What is Situational Leadership? How Flexibility Leads to Success. (2014, November 25). Retrieved April 23, 2020, from **https://online.stu.edu/articles/education/what-is-situational-leadership.aspx**

[4] Bililies, T. (2015, January 19). How to be a great leader in a complex world. Retrieved April 23, 2020, from **https://www.weforum.org/agenda/2015/01/great-leader-in-complex-world/**

[5] Verheyen, G. (2019, December 20). Minimal measures for minimal stability in a complex world (that will help you optimize your Scrum). Retrieved April 23, 2020, from **https://guntherverheyen.com/2019/12/20/minimal-measures-for-minimal-stability-in-a-complex-world-that-will-help-you-optimize-your-scrum/**

Figure 2. The Stages of Scrum Mastery
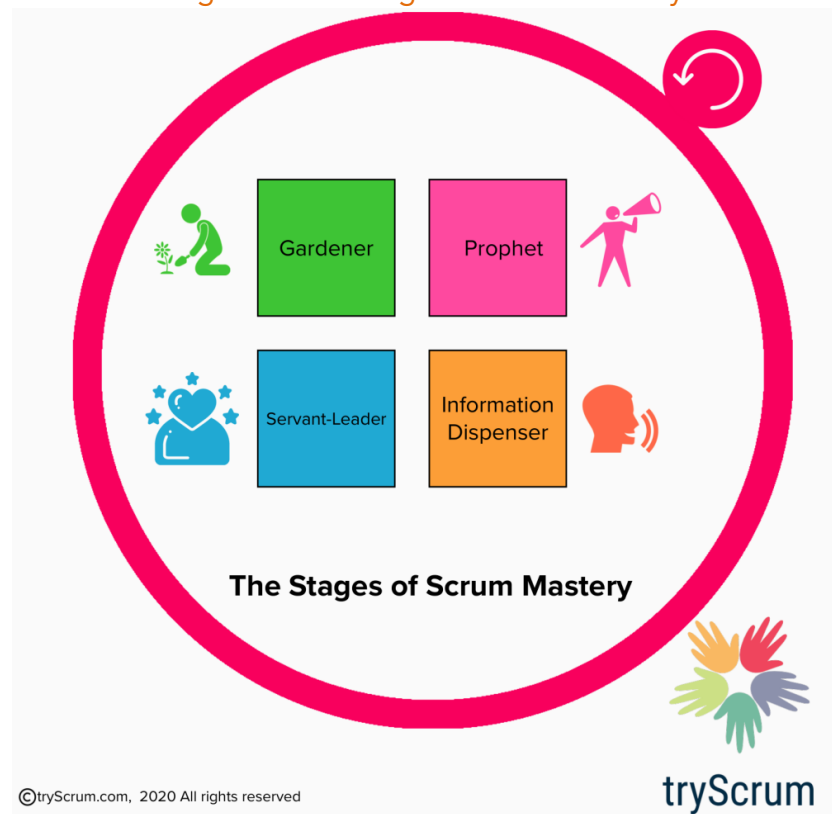
The Stages of Scrum Mastery

There are four stages of Scrum Mastery, and where you fall will determine both your effectiveness and efficiency as a servant-leader. Each stage may lead to the next and moving from the stage you're in to the next stage will help you become better at enabling self-organizing teams that better thrive in a complex world.

The Information Dispenser

This is one of the earliest stages of Scrum Mastery, and I call it "Information Dispensing." This stage of Scrum Mastery is quite volatile. At this stage, one is unaware of the necessary skills and lack of proficiency in playing the role.
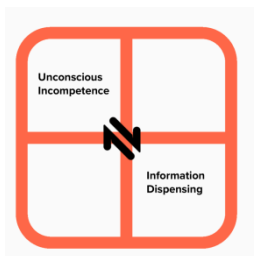
A couple of my personal experiences, in particular, helped me to call out this "Stage" under Unconscious Incompetence. As you may see, I would like to place the Information Dispenser under the "Unconscious Incompetence" quadrant. As a result, one may be unaware of the repercussions that will have on the teams.

When I had an opportunity to work as a Scrum Master in 2012 for one of the financial organizations, a third-party product was purchased from a vendor and a new team setup was done even before I joined. Team members often come up with "We should inspect if we need to continue using this product" in their retrospectives. On the other side, I get a lot of instructions from management.

I carry information from management like:

- What should be the Sprint cadence?
- Who estimates the story?
- What are the expectations of each Sprint?

I collect a lot of information from both sides and pass it back and forth. As an information dispensing Scrum Master, my focus was to collect all the information and put it in a common place. When I do so, I think my job is done instead of identifying patterns, making meaningful implications of data and using the data to provide inspect and adapt opportunities to create an environment for continuous improvement.

When someone asks me, I simply point people to the information source. In other words, I do not know the degree of my incompetence. I didn't make any conscious efforts to explore what other Scrum Masters are doing in the industry, how else I could be a better Scrum Master?

Fortunately, many Scrum Masters seem to evolve past this stage on their own. Yet, a considerable percentage of Scrum Masters are operating from this mindset. If you find that the only way to be an effective Scrum Master is to dispense information to your teams explicitly about what to do and then ride herd on them until they do it, there's a good chance you're stuck at the Information Dispenser stage.

You are unlikely to create a meaningful impact on your teams. Once this happens, there is even greater pressure on estimated project timescales, which only exacerbates the problem.

Symptoms:

- You always pass information to your teams.
- You are unaware of other skills (Facilitation, Teaching, Coaching) required to be an effective Scrum Master.
- You never thought of bringing people together to improve collaboration.
- You are unaware of what you are lacking.

Recommended Antidotes:

- Take some formal training (For example, first level Scrum Master workshops, preferably Professional Scrum Master™ (PSM) from Scrum.org).[6]
- Increase your awareness levels through self-directed learning, and community meetups.

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[6] Scrum.org. (n.d.). Professional Scrum Master™ Training. Retrieved April 23, 2020, from
https://www.scrum.org/courses/professional-scrum-master-training

The Prophet

There's a saying that "you cannot be a prophet in your own town." In other words, you will need to step back as soon as possible so others can step forward.

In my experience, this is one of the stages where most Scrum Masters find themselves. Most of the Scrum Masters that I have worked with are functioning from this mindset, may not realize how much of their time is being run on autopilot, shaped by the combination of outside expectations (especially their bosses) of those in their past and current circumstances, and the process relationships that the Scrum Master has built up around them. The prophets are authored by others. I would like to place the Prophet under the "Conscious Incompetence" quadrant.

I recall one of my fellow Scrum Master's stories in the past. He used to solve problems for teams and predict the future Sprints ahead. He was greatly rewarded for doing so. In fact, he was rewarded not only for solving the problems of the day but for looking ahead and predicting future trends even though they hadn't come true.

We called him "The Predictor." He continued to predict the future and built a lot of assumptions to guide the teams. Unfortunately, one of the assumptions was, the teams are not resourceful. So, he continued to step-up.

A few Sprints later, the teams were approaching the delivery deadline, a new change request arrived with no corresponding change to the client delivery expectations. He went to his boss for help, she said: "Solve for it."

He stepped-up and spoke to clients and predicted that it can be done if the teams could work on a weekend. Two days passed, and the team members came to him and said this is not possible to complete and it requires a lot of penetration testing. We do not have the penetration testing set-up at our end. When he went again to his boss for help, she said" "Solve for it."
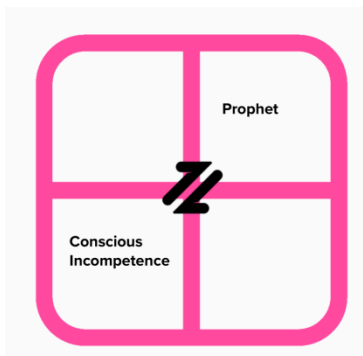
After a while, he found himself in the self-fulfilling prophecy trap. If like many Scrum Masters, you're at the Prophecy stage, it's worth making the effort to change.

The Scrum Master often feels like they have to step up for the team to do everything they can do for the team. This attitude may lead to creating teams that will always be dependent on the Scrum Master to step up. Such a situation will create dependency on the Scrum Master and will not be benefited in the long run.

At this stage, you are Consciously Incompetent perhaps because of peer pressure. While you may have experience a burst of excitement and enthusiasm when you began, that initial energy tends to dissipate slowly.

Symptoms:

- You are aware of the skills required to be an effective Scrum Master but you lack understanding.

- You are unaware of the traits (For example, Persuasion, and Resourcefulness).

- You may lack influencing skills.

- You are not focusing on building self-organizing teams.
- You started off well but not able to sustain things.
- You are stuck in between your Management and Team.

Recommended Antidotes:

- Start with trust. Empower your teams.
- Explore other stances of the Scrum Master through formal training (For example; Professional Scrum Master™ II (PSM II) from Scrum.org).[7]
- Leverage Facilitation Techniques (For example; Liberating Structures).
- Increase your self-awareness.
- Find a Mentor or a Coach.

The Gardener

Scrum Masters at this stage of development are operating from both inside and outside. While the purposes may be different, the steps gardeners take to prepare the soil, plant, and care for their gardens are very similar and relevant for Scrum Masters. They look for growth both in teams and themselves. They realize that, in the right conditions, people do actually learn, grow, and change.

Gardeners realize there is so much to see and do in a garden. They focus on the brighter spots rather than dwelling on the challenges they are facing or the lengthy to-do list waiting for them. Similarly, Scrum Masters at this stage focus on removing unfavorable conditions that promote collaboration. I would like to place the Gardener under the "Conscious Competence" quadrant.

I recollect one of my recent assignments as a Scrum Master in a start-up. The following story illustrates my experience as a Gardener.
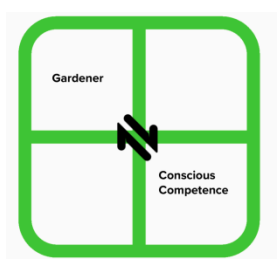
"We cannot sign-off on this," said one of the Team members. The entire team was silently listening to her in one of the Retrospectives. She continued to add more information saying there was a lot of bugs and we did not have sufficient time to test. She conveyed to the team that she had already escalated to the "Test Manager" who is going to talk to the "Development Manager" to ensure we get the build on time so that we can find more bugs. This time I started to use my intuition, I sensed an unfavorable condition that is preventing the team from talking as "team."

The primary responsibility of the Gardener is to remove unfavorable conditions for the plant to grow. Likewise, Scrum Masters create a safe working environment where collaboration can occur.

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[7] Scrum.org. (n.d.). Professional Scrum Master™ II Training. Retrieved April 23, 2020, from
https://www.scrum.org/courses/professional-scrum-master-ii-training

I realized my crucial task was to remove the unfavorable conditions (impediments), pests and insects which can damage the plants. In this case, the team was not working as a team, there were silos. I worked with the Organization to remove the Structural impediment which was preventing teams from working like "teams."

My focus was to remove the Structural Impediment and bring one team culture which created a sense of accountability as a team. I heard not only the voice of the team but also the voice of the system. A few Sprints later, the team's language was "We need to solve this." They moved away from "Ego" to echo.

> *Gardener Scrum Masters nurture both the teams and the system. They need to be creative at this stage to nurture the System, resolve conflict, remove distractions, and confront problems. Like the master gardener, you are the primary weed control expert charged with encouraging growth.*

Another fact exists about the Gardeners that one can't overlook. Gardeners invest a lot of time, effort, and passion in tending to their plants. However, in the end, they understand and acknowledge the fact that they are never in control. They do their work consistently with hope in their hearts, but they leave the rest to Mother Nature.[8]

Likewise, Scrum Masters at this stage create a safe environment for teams to thrive, they foster collaboration, they provide the necessary environment for growth for the individuals in the organization. In the end, they don't take pride in the outcomes.

You have to realize, when you are in this stage, that you are helping people grow and recognize their true potential.[8]

Symptoms:

- You are aware of the skills and traits required to be an effective Scrum Master but you need to make conscious efforts to use them.

- You are aware that you can achieve 'conscious competence' in a skill when you perform it reliably at will.

- Ideally commit yourself to consistent practice with devotion, patience, and friendliness toward yourself, and if appropriate commit to becoming 'unconsciously competent' at the new skill.

- You are showing respect and concern for others.

- You are genuinely caring for others.

- You are persuasive, not abrasive.

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[8] Eikenberry, K. (2011, April). Five Reasons Remarkable Leaders Are Master Gardeners. Retrieved from **https://blog.kevineikenberry.com/leadership-supervisory-skills/five-reasons-remarkable-leaders-are-master-gardeners/**

Further Tips:

- Gain Coaching Skills (For example Co-active, Narrative, ORSC).
- Practice Active Listening.[9]
- Increase Self-awareness.
- Practice empathy.

The Servant-Leader

I was inspired by Robert K. Greenleaf, the originator of the term servant-leadership. He described a servant-leader as: "The servant-leader is the servant first… It begins with the natural feeling that one wants to serve."[10] It's one form of leadership that's inevitably complex. Scrum Masters here authorize themselves. They know it's a choice and they lead through their deeply held discriminating values and principles.[11]

> *If you help people get what they want, they will help you get what you want.*
> *(Zig Ziglar)*
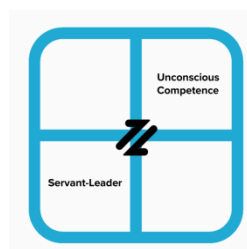
Seven years ago, when I first read about servant-leadership the first question to nobody's surprise that came to my mind was "What are we trying to do?" And the next "servant and leader – can these two roles go together?" I started to realize everything begins with the initiative of an individual.

When I got an opportunity to work for a Security Product Company, I was hired as a Manager, later I was asked if I could be a Scrum Master for a different team. Having worked with multiple companies as a Scrum Master, I made a conscious choice (personal choice) of moving from Gardener to servant-Leader.

As I set to serve, I was not sure what the result would be? This is part of every Scrum Master's dilemma (at least mine). I started to serve my team "SunShine", that was the team's name. They were working toward a major release that was supposed to go to production in a week's time. Just a week before the release date, there was a technical glitch.

The senior manager raised concerns and immediately set up a meeting to meet the entire team along with the architects. The entire team was discussing an issue related to a major architectural change. But then, they were discussing the lack of time to complete the task. There was some back and forth.

I was listening to what was being said and what was not being said. I continued to listen to the discussion. All of a sudden the senior manager asked me "What do you think we should be doing now?

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[9] Kashinov, K. (2019, July 22). The Art of Listening. Retrieved April 23, 2020, from https://coachfederation.org/blog/the-art-of-listening

[10] Greenleaf, R. K. (n.d.). Who is a servant-leader? Retrieved April 23, 2020, from https://www.greenleaf.org/

[11] Zetlin, M. (2016, July 29). There Are 5 Stages of Leadership. Which One Describes You? Retrieved April 23, 2020, from https://www.inc.com/minda-zetlin/there-are-5-stages-of-leadership-where-are-you-on-the-scale.html

True leadership always begins with the inner person.
(John Maxwell)

I asked the group. "We have been discussing two things, an architectural problem, and a timeline. Which one do you think as a group we should focus on first?" The team started to think aloud, then realized we are discussing two problems here: A deadline and an architectural change. Then, the team brainstormed on what should come first?

The whole conversation went on to focus on one thing that was most valuable. As soon as two or more people came together, we had more intelligence in teams and the weakest voices started speaking.

Scrum Masters at this stage self-authored to realize **skill and traits** to become a servant-leader. They withhold their response. Listening and reflecting helps the team generate new insights. Bringing these insights forward before bringing your own is a virtue.

The Scrum Guide[12] describes the Scrum Master as the servant-leader for the Scrum Team. Similarly, Barry Overeem (inspired by *Scrum Mastery* by Geoff Watts) describes the Scrum Master as someone who, "…is not a master of the team, but a master at encouraging, enabling, and energizing people to gel as a team and realize their full potential."[13]

Symptoms of servant-leadership identified by Overeem[13]:

- "Focuses on building a foundation of trust"
- "Stimulates empowerment and transparency"
- "Encourages collaborative engagements"
- "Is an un-blocker and empathetic person able to truly listen"
- "Shows ethical and caring behavior, putting others' needs first"
- "Is humble, knowledgeable, positive, social and situationally aware"

Additional symptoms:

- You adapt Situational-Leadership.
- You have all the power but avoid using it.
- Have humility and willingness to admit mistakes.
- Patience is your sibling.
- You realize this is a "Thankless" job, yet you are proud to serve your teams.

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[12] Schwaber, K., & Sutherland, J. (2017, November). The Scrum Guide. Retrieved April 23, 2020, from **https://scrumguides.org/**

[13] Overeem, B. (2015, July 20). The Scrum Master as a Servant-Leader. Retrieved April 23, 2020, from **https://www.scrum.org/resources/blog/scrum-master-servant-leader#_ftnref6**

Further Tips:

- Enhance Professional Coaching Skills (For example, ICF, John Maxwell, Nationleadership, Brain-Based Coaching).
- Practice Global Listening.[14]
- Continue to acquire new skills.
- Practice Growth Mindset.
- Practice, Practice, Practice!

Scrum Masters at this stage are not rare but exceedingly so. Remember, this place is not a resting place for Scrum Masters but a journey.

Reflection

As a Scrum Master, you can self-realize how much time you are spending in any specific area. And what steps you need to take to find consistency in the wheel of balance.

Scrum Mastery - The Wheel of Balance
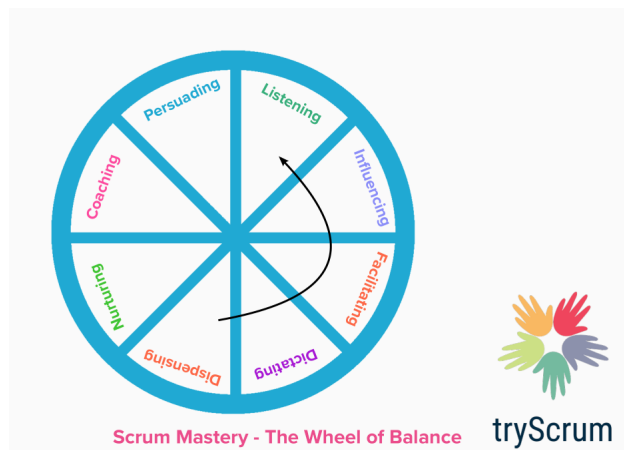
Conclusion

Becoming a Scrum Master is a hard choice. When we decide to follow the career path to becoming a Scrum Master, I believe we are here to contribute to the world through developing our abilities to create outcomes that matter and also to become whole by exploring and reframing our structure of beliefs.

To combine these two efforts to serve and lead as a servant-leader, engaging in these disciplines with honesty and authenticity, a committed student of oneself and one's surroundings will move us toward servant-leadership and true empowerment, toward greatness, toward organizations, and a global community that reflects and fulfills our highest aspirations.

Warren Bennis, in his book *On Becoming A Leader*, states that all of the leaders he interviewed agreed on the following points: "Leaders are made, not born, and made more

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[14] Lister, M. (2018, June 3). Listening. Retrieved April 23, 2020, from **https://coactive.com/blog/listening/**

by themselves than by any external means. No leader sets out to be a leader per se, but rather to express him/herself freely and fully. Becoming a servant-leader is synonymous with becoming yourself. It is precisely that simple, and it's also that difficult. First and foremost, find out what it is you're about and be that."

Moving away from Information dispensing to servant-leaders is ultimately a choice. Which game are you playing?

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Additional Recommended Resources

Adkins, L., Highsmith, J., & Cohn, M. (2010). Coaching agile teams a companion for ScrumMasters, agile coaches, and project managers in transition. Upper Saddle River(NJ): Addison-Wesley.

Anderson, C. (2014, February 3). Why a Coach Cannot Create Awareness for the Client. Retrieved April 23, 2020, from https://coachfederation.org/blog/why-a-coach-cannot-create-awareness-for-the-client

Be an Effective and Inspiring Leader. (n.d.). Retrieved from http://theleadershipcircle.com/

BusinessBalls. (n.d.). Conscious Competence Learning Model. Retrieved from https://www.businessballs.com/self-awareness/conscious-competence-learning-model/

Christensen, U. J. (2017, September 29). How to Teach Employees Skills They Don't Know They Lack. Retrieved from https://hbr.org/2017/09/how-to-teach-employees-skills-they-dont-know-they-lack

Jeffrey, S. (n.d.). The Four Stages of Learning Anything on Your Path to Self-Actualization. Retrieved April 23, 2020, from https://scottjeffrey.com/four-stages-of-learning/

Maxwell, J. C. (2013). 5 Levels of leadership: proven steps to maximise your potential. Place of publication not identified: Hodder & Stoughton Ltd.

Mulder, P. (2017). 5 Levels of Leadership by John Maxwell summary. Retrieved from https://www.toolshero.com/leadership/5-levels-of-leadership-maxwell/

Rød, A., & Fridjhon, M. (2016). Creating intelligent teams. Randburg: KR Publishing.

The John Maxwell Team. (n.d.). The Heart of Leadership: Becoming a Servant Leader. Retrieved April 23, 2020, from https://www.johnmaxwellteam.com/the-heart-of-leadership/

Whitworth, L., Sandhal, P., Kimsey-House, K., & Kimsey-House, H. (2018). Co-Active Coaching, Fourth Edition: The Proven Framework for Transformative Conversations at Work and in Life. Nicholas Brealey Publishing.