

Jesus Mendez

# Lift off Agile teams - Team Transformation Process

JESUS MENDEZ

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# **LIFT OFF AGILE TEAMS – TEAM TRANSFORMATION PROCESS**

Lift off Agile teams – Team Transformation Process

1<sup>st</sup> edition

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ISBN 978-87-403-2397-9

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# ABOUT THE AUTHOR



Jesus is all about helping people to find ways to reach their highest potential by offering the gift of coaching. He has contributed in delivering more than 25 projects over his combined professional career. He is a passionate reader who has spent the last five 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 Bruce W. Tuckman's group development theory.

Find him on [LinkedIn](#).

# INTRODUCTION

The tools provided in this first workbook out of three offer an alternative and proven path to help with adding more structure, transparency and visibility to what we coaches do when assisting Agile teams. This book combines visual explanations with techniques and tips to support our crucial role within the organization as Scrum Masters/Agile Coaches/Agile Leaders.

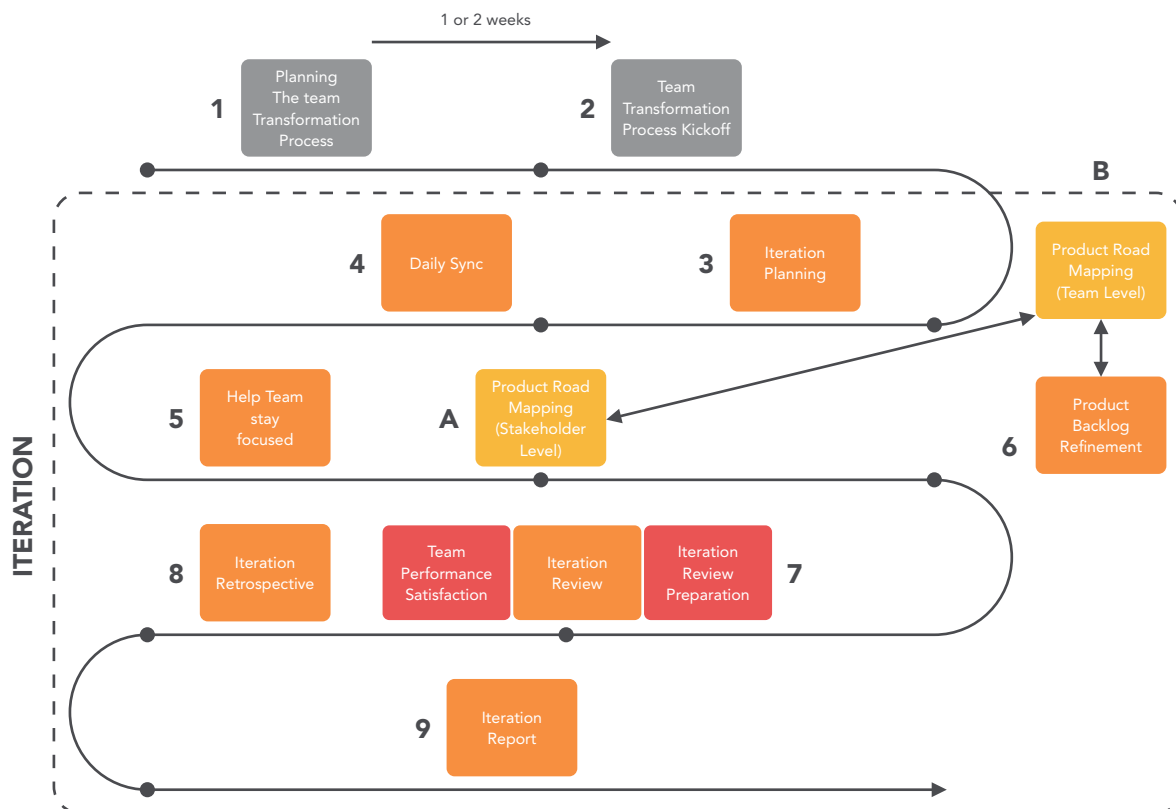
This workbook covers the first two steps (Planning the Team Transformation Process and Team Transformation Process Kick-off) of the “Forming Agile Teams Flow”, a step by step flow that I have created on top of the traditional Scrum framework. It is composed of nine steps to facilitate understanding and gives you a better idea about what, why, how and when I recommend using the suggested techniques.

In addition, it is important for you to know that the techniques and tools that you’ll find documented here are the result of a practical journey, plenty of learning, try outs, a lot of reading, meeting and collaborating with beautiful and exceptional people, many hours of introspection and self growth.

I wish you all the best with reducing your team’s ambiguity by increasing clarity through an incredible and nurturing experience.

# 1 FORMING AN AGILE TEAM FLOW

I'm a visual person, I need to draw to put ideas together and be able to learn, digest and share my understandings with people. One day, I was having a difficult time getting thoughts out of my head; I was stuck and frustrated because I couldn't find that something to connect all the dots. I talked about it with my friend **Ida Perciballi**<sup>1</sup>, one of the Product Owners that I have the pleasure to work with. After explaining my frustration to her, she suggested this brilliant idea to me of creating a workflow to walk readers through the team transformation process and contextualize where to apply the techniques for forming agile teams.



**Figure 1** – Forming an Agile Team Flow

That is what I thought I was looking at: a way to explain the techniques that I've learned when forming agile teams by using a visual diagram to put all the ideas together and I came up with this diagram that I called the "Forming an Agile Team Flow." It is inspired by a typical sprint as described in the Agile Scrum framework.

## 1.1 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 of at least one representative of each group who has an interest in the team being transformed.

Furthermore, I truly believe that installing common sense should be our **motto**. We need to guide people, teams and organizations to understand that being agile means using common sense in every single circumstance. I also believe that connecting people by collaborating is our main mission as people's helpers. This may sound easy to do, but in practice it may be hard to achieve, especially when the only authority that you have over people comes from your ability to influence their lives and help them welcome change by making it part of their journey.

It is a big task to be leading by example and permanently be there to inspire others to inspect and adapt. It requires courage, self-awareness, humility, love and hope that the best will come if we do it together.

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

### 1.1.1 PLANNING THE TEAM'S TRANSFORMATION PROCESS

Before meeting the team, there is a change to be managed, planned and communicated, and that is the change that you are about to begin when transforming the team into a high-performing sustainable one. This change 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 is going to happen in an agile fashion, i.e. iteration by iteration? Why should we care about planning changes, when playing the Scrum Master or Agile Coach role? In my opinion it depends, but I prefer a clear understanding about what is 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 what is the plan?
- The team and its composition
- How the team works.



### **What is the main goal here?**

“Mitigate change resistance by reducing ambiguity, increasing visibility and creating awareness about the project at every level involved”; to gain the people’s trust and create the required conditions to successfully reach the people’s heart.

### **How does one do it? How does one get everybody involved in the project and on the same page?**

First, I gather enough information to create the “project charter”, by talking with all parties involved in the “team’s transformation project”. Here are the steps that I follow to complete this stage of the process:

#### ***Preliminary work (This is all about the team and the environment)***

**Purpose:** Get ready to talk with the project’s main stakeholder.

**Tactic:** Collect information about the team by meeting with their line manager(s) and asking questions such as:

- Is the team being formed for this specific project?
- How long has the team been working together?
- What is the team’s development process?
- Who are the project’s main stakeholders?
- Who are the customers?
- How does the team work?



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

#### ***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 the project's 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 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 is the project about?
2. Why are we doing it right now?
3. Reasons and 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 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 the Team's transformation process project charter for every person present at the meeting.

## **1.1.2 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 on-going improvement 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. Gaining their trust means them believing in you and what you will bring to the team wholeheartedly.

How does one do it? How does one establish a relationship of trust?

The focus here is to create the conditions and environment to make people feel safe enough to leave their comfort zones and learn to change continuously.

Let's discuss what needs to be taken into consideration at this stage:

- What is the team history?
- Who are the team sponsors?
- Who are the key people in the team?
- How is the team doing things?
- How does one know that the relationship of trust has been established?

### ***It's all about the people***

Getting to know the people that you're about to start working with requires time, love and strategy. In my case, I use the steps of **the arc of a coaching conversation**<sup>2</sup> to approach the team and start learning about them. The first thing that I do is “**start exploring**”. Depending of the project, I give myself a full iteration at least to explore and observe respectfully how the team behave, interact and collaborate. 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 is the tone of voice used between people in the team? Positive, Negative or Others?

### ***What's the main focus here?***

Our main job is to be present for the team and be ready to listen actively to what and how things are being said. The intension here is to get enough context about the team so it's recommended to avoid judgement and listen intently.



**Tip:** Being outside of the group as an observer shows the team that you respect their space. Pay attention to where you place yourself. I used to put myself out of the team area.

In order to explore, I like using “What” questions, combined with a polite approach, for example:

- Regarding the team’s recurrent meetings, would you mind telling me about the team’s schedule?
- Regarding the development process, what are the steps of the team’s current development process?
- Regarding the team, what does the team like about working together?
- Regarding the project, what are the project main goals?
- Regarding the product/service, is there any product/service vision available? Do you mind sharing it with me?



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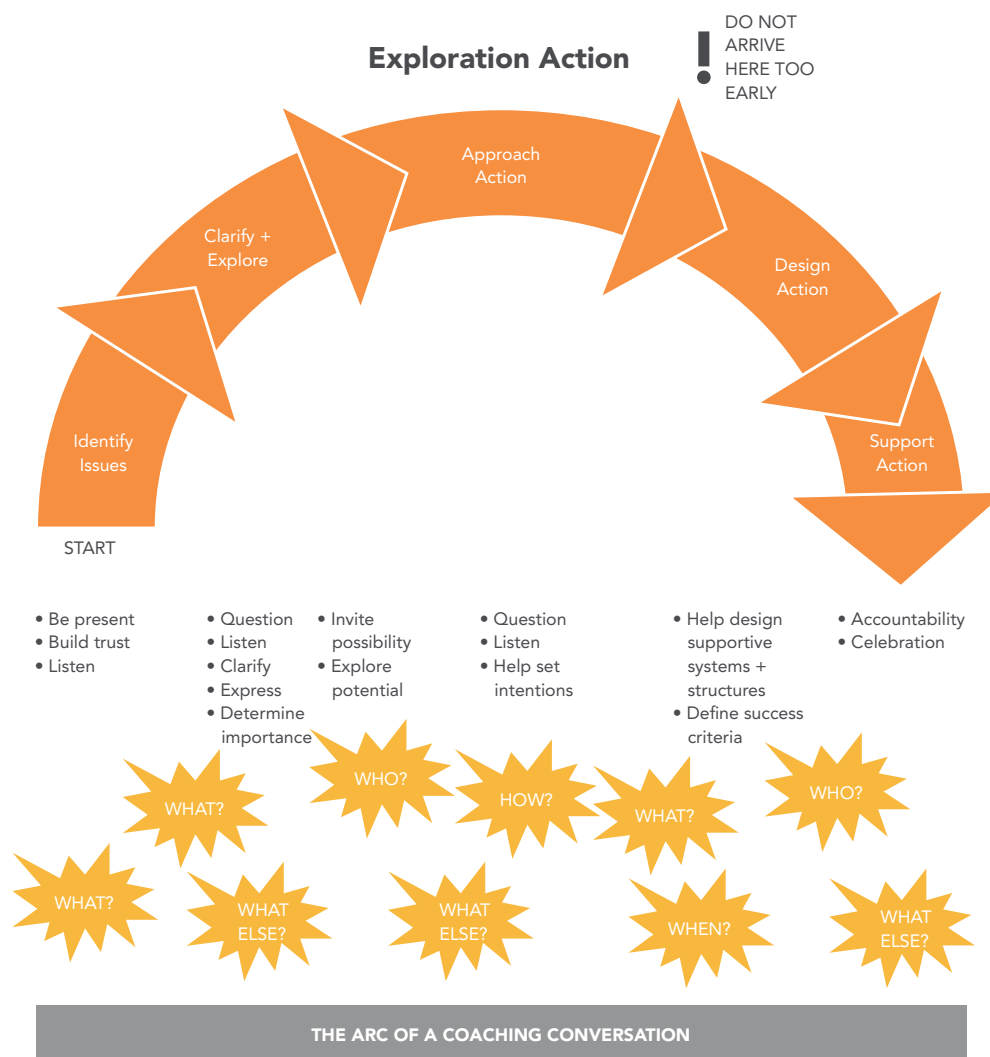
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## *The leadership team first*

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

The leadership team should be supporting what we are about to do with the team, that's why it's important to get them on board collaborating with us, to enable change within the team, then with the project, and so on.



**Figure 2** – the arc of a coaching conversation<sup>3</sup>

### 1.1.2.1 *Project Stakeholders*

**Scott W Ambler** defines Stakeholders<sup>4</sup> 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.”

These people are directly impacted or potentially affected by the changes done to the software under development. I really like the stakeholder categorization made by **Carl Kessler** and **John Sweitzer** in their book **Outside-in Software Development**<sup>5</sup>, also mentioned by **Scott W. Ambler** in 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. Their participation and permanent support of the product in development and the team behind it are crucial during this stage of the team's transformation process. It is also crucial given that they will challenge what product owners do along the way and collaborate with the team to build appropriate product solutions to solve their problems or needs. Regarding the stakeholders and their expectations about the formed team, I like to ask only the main stakeholder to join the Product Owner and meet to discuss about **Product development expectations**.

### 1.1.2.2 *Product Owner*

The Product owner is responsible and accountable for the project, product or service that the team will be working on. This role matters because money wise these people are making decisions about what should be delivered, why and when. Their capacity to oversee how their product or service will look like in the future, how to plan efficiently to get there and how that is communicated, influences what kind of team they think is 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. Below are some techniques that I like using 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?**

- 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:**

- Roles and responsibilities
- How to collaborate towards reaching amazing results
- Everything else that you consider makes sense for your specific context

#### **Expected outcome**

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



**Tip:** If there is no Product Vision available, I strongly recommend you start discussing about the goals of the product for the next three months and make that visible for the team. You could use the **Team's Road Map template** presented below.

### *Product planning weekly based meeting*

#### **What is the purpose?**

- 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 a good opportunity to explain and discuss about what your role and responsibilities are regarding the team. Please avoid assuming that the Product Owner understands what the scope of your role is. Share details about commanding/controlling versus influencing and empowering. When do you intervene and why is it important to let the team learn from failure?

### Expected outcome

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

From what I've seen in the field, Product Owners want to rely on a team that delivers results consistently, as soon as possible, so it's important to remember this.



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

#### 1.1.2.3 *Line Managers*

The line manager's main role is to support their employee's activities by providing them with the required tools needed to do their job. In an agile environment, there is an additional support required for the development process. The line manager's capacity to allow Scrum Masters/Agile coaches do their job, and the ability to empower teams to self-organize their work, is a key factor to consider when working with teams. Here are some techniques that I like to 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 used to have monthly one-on-ones with line managers where we discussed about how the team is doing, what the biggest road blockers are and what my Scrum Master/Agile Coach's perception about their happiness is.

- **Benefits:** Meeting often helps with increasing collaboration between the Scrum Master and the line manager, brings insights about their employees, creates opportunities for crucial conversations and speeds up the decision-making process no matter how things are going for the employees.
- **Potential risks:** Monthly meetings are time-consuming, and it could be a 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 managers need to be creative to find ways to connect and discuss with their teams, without interrupting their flow or becoming impediments to their job. I have tried to allow special time at the end of the iteration review and before the iteration retrospective, where managers would discuss openly with the team about how things are going.

- **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 a 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 people leaving the company.
- **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 deliver high quality results consistently and faster than before. Please remember that when working with them during 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 are the elements to be considered when building project charter:

### *Team's Transformation Process Project Charter Template*

#### **What is this project about?**

I.e. the cars division wants to rely on a team that is able to deliver any kind of work anytime and within the forecasted budget and timeline.

#### **Why are we doing it right now?**

| Reason   | Strategy   |
|--|--|
| E.g. Focus on what brings value to the division to increase the Return on Investment per project | E.g. Optimize where the company put its efforts by distributing the content to be integrated properly. |
| E.g. Increase operational efficiency   | E.g. Improve project planning and prioritization at the Product team level                             |
|  | E.g. Increase collaboration with directors and <b>different stakeholders</b>                           |
|  | E.g. Build a high-performing sustainable development team  |

**Figure 3** – Team's Transforming Process Project Charter-Reasons

#### **Mission/Purpose of the team**

- E.g. “We help internal customers to keep their applications up and running by providing 24/7 IT management and monitoring services”.

**Vision of the team 1 year from now**

- E.g. a fully collaborative and cross functional team is in place
- E.g. every member of the development team can work on any project at any time
- E.g. knowledge is shared within the team – this is done via development process
- E.g. a high-performing sustainable development team is in place.

**Main goals for the upcoming three months**

- E.g. Team' Development process is implemented end to end
- E.g. Development team backlog is healthy (properly prioritized based on what the business wants and what brings more value)

**Roles and responsibilities**

| Role   | Responsibilities   |
|--|--|
| Main Stakeholder (Full name)                       | E.g. sets high level vision for the content to be developed<br>E.g. negotiates priorities with customers.<br>E.g. helps Product Owners make the vision and corporate goals tangible in the development team backlog  |
| Product/Service Owner (Full name)                  | E.g. manages development team backlog<br>E.g. decides what to do and when (establishes backlog priorities)<br>E.g. negotiates priorities with main Stakeholder<br>E.g. leads development team to deliver the content of its backlog<br>E.g. collaborates with the Agile Coach/Scrum Master in order to create a high-performing sustainable team.<br>E.g. collaborates with the delivery team with refining the development team's backlog |
| Agile Coach/Scrum Master (Full name)               | E.g. Sheppard's team development process<br>E.g. coaches the team to become a self-organizing and high-performing sustainable team<br>E.g. coaches Product Owners with managing the team's backlog and with leading the team<br>E.g. facilitates all team ceremonies<br>E.g. facilitates interactions between team members<br>E.g. removes impediments from the way of the team  |
| Development team (Name of the team or description) | E.g. does the job to [description of what the team does]<br>E.g. delivers high-quality ____ for [division/unit/client]<br>E.g. collaborates with Product Owners and the Agile Coach/Scrum Master to increase team's performance<br>E.g. raises impediments and makes them visible to the team  |
| Line team manager(s) Full Name                     | E.g. brings support to the team and the development process<br>E.g. collaborates with the Agile Coach/Scrum Master by removing impediments   |
| Stakeholders (list of all stakeholders)            | E.g. collaborates with the team and the Product team while grooming the content of the development team backlog  |

**Figure 4 – Team's Transforming Process Project Charter: Roles and responsibilities**

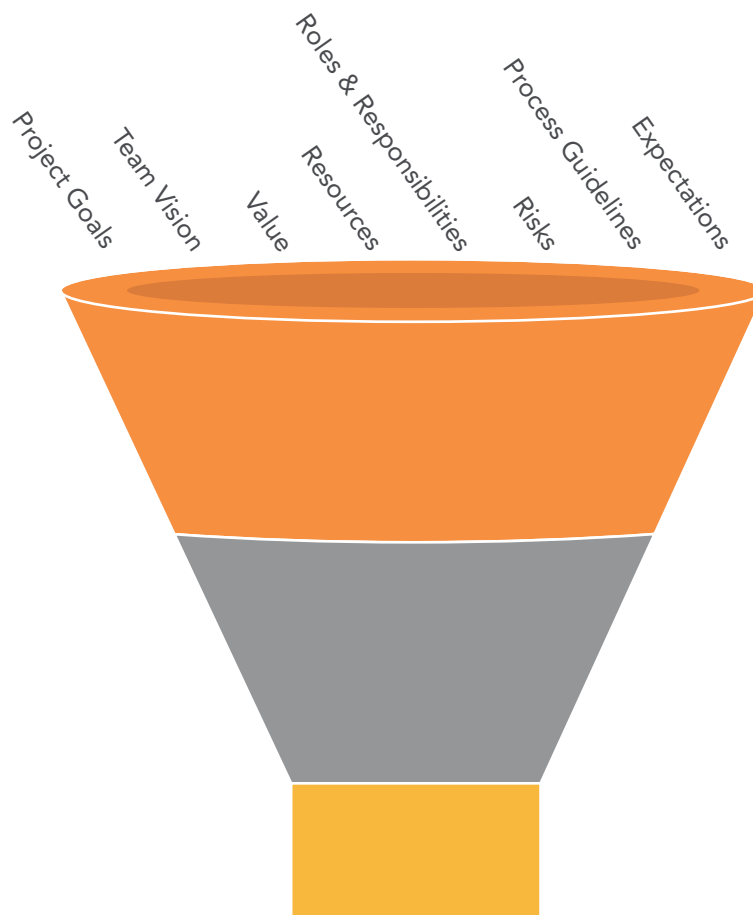
## High-level Risks

| Risk Category   | Description   |
|-----------------|---|
| Human Resources | E.g. people's resistance to change                          |
| Communication   | E.g. limited support from Stakeholders and PO's             |
| Communication   | E.g. unclear goals, and unshared mission and vision         |
| Communication   | E.g. unclear roles and responsibilities                     |
| Resources       | E.g. project loses interest and stakeholder stop funding it |

**Figure 5** – Team's Transforming Process Project Charter: High level risks

## Process high level guidelines

I.e. This new 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 is in place.



**Figure 6** – Team's Transformation Process Project Charter

### *Kick-off meeting setup*

Once the team's transformation Process Project Charter is completed, set up for the kick-off meeting. Here are 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 are 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 set up and the day has come to start interacting frequently with your new team. To facilitate this process, I like to follow the following agenda during the kick-off meeting:

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

**Figure 7** – Team's Transformation Process Project – Kick off Agenda

#### **1.1.2.4 The Development team**

Once the project has kicked off and the leadership team has been approached, the 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 are some techniques that I use when approaching the team and start building a relationship of trust:

### *Get introduced by somebody already trusted*

After discussing with the leadership team, it is a clever idea to ask the person that is most trusted by the team to introduce you to the group. This will influence people's opinions, ease assumptions and avoid unnecessary judgements that could get in the way of creating an amazing and productive relationship based on trust. If that's not possible, I like to ask another Scrum Master (if available) to do it for me.

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



**Tip:** This act is important, so please pay attention to details. I would strongly recommend trusting 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*

Now that you have joined a new team, people will start to observe how you behave. It's normal to expect that people would try you in different ways during this stage of the group development. Group acceptance, knowledge validation, shared interests and leadership will still be tested in this phase, so be humble and listen actively to what the team is trying to say.

- **Benefits:** As long as they feel heard, that you are not a threat to them and that you are there to help them with honesty, you will 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.

- **Potential risks:** Personal attacks from people's dysfunctional behaviors could be recurrent here and could make you and the team feel uncomfortable.



**Tip:** "It's not about you; it's what you represent to them, so please do yourself a favor and don't take it personally."

– Omar Bermudez, Coaching session, Montreal 2013

### *Give yourself time to observe*

Good things take time. Don't rush. What I do is to take at least a full iteration to just observe and take notes about how the team works, interacts and what is happening.

- **Benefits:** Giving yourself time to observe the team will offer you the chance to better comprehend the system the team has become. It will give you insights to validate how to proceed in the future. It will also give you a closer look at who's

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playing which role in the team, and this could lead to ideas about how to approach individuals next.

- **Potential risks:** This could create the perception that you're doing nothing to help the team, so be careful and communicate your strategies in advance 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. 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 leading by example. 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 on a board – just be ready to do what you love most.

- **Benefits:** By being present you show that you care about them, and people will appreciate that. This will help you build the relationship of trust. Being on time shows that you respect the process, the organization and people. Always being ready to rock will demonstrate your disposition to help them when needed and this will create support and a baseline for a strong relationship of trust too.
- **Potential risks:** Becoming impatient and trying to fix people's behaviour could diminish all your efforts and destroy what has been built in seconds. Be careful.

## 1.2 IT'S ALL DONE BY ITERATIONS

Now that you have completed the first stage of the Agile team's transformation process, it's time for the Agile team to start with their first iteration. Within this context, iteration/sprint 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](https://www.scrum.org) defines sprints as:

“the heart of Scrum, a time-box of one month or less during which a ‘Done’, a useable, and potentially releasable product increment is created”.

**Mike Cohn**<sup>6</sup> mentions in his article “**Differences between Scrum and Extreme Programming**”<sup>7</sup>:

“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”.

When we refer to Iterations/Sprints we are talking about a time-box of one week to a month, during which a “Done”, a useable product/services that resolves a customer problem increment, is built by the agile team.

#### What activities compose a typical iteration in the context of an Agile team lift-off process through Scrum?

| Activity                | Description  |
|-------------------------|--|
| <b>Iteration/Sprint</b> | During the <b>Iteration</b> , 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 feedback. Communication and collaboration facilitate change and keep everyone doing what makes most sense, reducing waste as much as possible. |

| Activity                         | Description   |
|----------------------------------|---|
| <b>Iteration/Sprint Planning</b> | “The <b>Iteration/Sprint planning</b> is a cooperative and collaborative event that requires the customer voice representative (The Product Owner), the development team and all other specialists. 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   |
|-----------------------|---|
| <b>Daily Stand Up</b> | The <b>Daily Stand up</b> 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  |
|----------------------------|--|
| <b>Team’s Road Mapping</b> | The <b>Team’s Road Mapping</b> is an event that happens once per quarter, where the Product Owner assisted by the Scrum Master/ Agile Coach, identifies what goals should be reached by the team in the upcoming three months. Once the first version is done, the Product Owner collaborates with the Development team to get ready to tackle what’s coming within the next Product Backlog Refinement session. |

| Activity                          | Description  |
|-----------------------------------|--|
| <b>Product Backlog Refinement</b> | <b>Product Backlog refinement</b> allows the agile team to keep the product backlog updated for upcoming iterations. Product Backlog refinements happen 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 needed during the iteration, 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 it should be done now. |

| Activity                               | Description   |
|--|---|
| <b>Iteration/Sprint Review Dry Run</b> | The <b>iteration review Dry-run</b> is the event where the agile team prepares what should be delivered at the iteration review. It’s a 30-minute to 1-hour meeting, for the development team to go through the iteration backlog 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 helps the team to organize the information to be shared at the iteration review: for example the iteration status, what will be demonstrated, what the list of updates will be (no demo included), what is worthy to be shown even if it is not 100% finished and what is next in terms of the Product. |

| Activity                | Description   |
|-------------------------|---|
| Iteration/Sprint Review | The <b>iteration review</b> 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 moment 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, we evaluate the <b>team's performance satisfaction</b> regarding the work that the team has done during the iteration. By using the Team's Performance Satisfaction Template, stakeholders and agile teams share their happiness level (from 1 to 5, 1 being very sad and 5 very happy) regarding the team's performance during a given iteration/sprint. |

| Activity                       | Description  |
|--------------------------------|--|
| Iteration/Sprint Retrospective | During the <b>iteration retrospective</b> , the development team collaborates to develop what was 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 feedback. Communication and collaboration facilitates changes and keeps everyone doing what makes most sense, reducing waste as much as possible. |

| Activity                | Description  |
|-------------------------|--|
| Iteration/Sprint Report | By the end of the iteration, the Scrum Master/Agile Coach will create the <b>Iteration/Sprint Report</b> by using the Iteration Report Template 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/Sprint: How long does it last?

It really depends on the team. In my experience, two weeks of iteration/sprint are good enough for the development team to deliver high quality products and for the organization to keep participating in agile events.



**Tip:** If the team identifies that the duration of their iteration is an impediment for them to complete what they have committed to do, then challenge them to look for the root cause of it. Usually what happens is that the team is over-committing, or that a hidden issue is causing the team to ask for more time to finish their task.

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

### **Why iterations/sprints?**

Some of the principles behind the **manifesto for agile software development**<sup>8</sup> justify the fact of having iterations/sprints 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.”**

# WHAT'S NEXT?

This book is the first part of the “Jesus Mendez Agile series”. When you feel ready, we invite you to read the next books in the series:

- ➔ Lift off Agile Teams: Iterations
- ➔ Agile teams: Improvement tools and exercises

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

# GLOSSARY

## :: A

**Accept Risk:** the cost to mitigate is higher than the cost to bear the risk, so you move forward.

**Avoid Risk:** an event of high likelihood and significant financial impact, so take a proactive stance.

## :: B

**Backlog:** An inventory of Agile stories/tasks/items that can be selected to be worked on.

**Bug:** a behavior/layout problem that goes against functional specifications and/or approved design that provides business value. [Needs to be addressed but you can choose when].

## :: D

**Definition of Done (DOD):** a set of checkpoints agreed upon by a Scrum team to determine the completion of tasks.

**Development Team:** the role within an agile 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

**Impact (Risk):** the extent to which the risk may affect the company – includes financial, reputation, employee, customer and operational impacts.

**Impediment:** Anything that creates any sort of perceived resistance, friction or drag on the project. That friction can manifest as personal conflicts, slow software network problems or even technical debt. All these problems can slow down a team's progress.

**Iteration:** a time-boxed event of 30 days or less, that serves as a container for the other iteration 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 Iteration, often a business problem that is addressed. Functionality might be adjusted during the Iteration in order to achieve the Iteration Goal.

## :: L

**Likelihood (Risk):** the possibility it will occur and may be represented in a qualitative or quantitative manner.

**Line Manager:** the role within an organization accountable for guiding, coaching, supporting, evaluating and assisting team members in an agile organization.

## :: M

**Mitigate Risk:** try to control the impact of the risk; allow it but play constant attention to seek minimal exposure.

## :: 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 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).

:: R

**Risk:** a situation involving exposure to damage, harm or loss.

:: 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 Guide TM.

**Scrum Master:** the role within an Agile Team (Especially in Scrum Teams) 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 Agile 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 Agile Team at Iteration Review.

**Stories:** items that are created for an agile team to work on that have business value. They are based on customer wants and have validation criteria associated to them.

:: 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.

# NOTES AND REFERENCES

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## **It's all done by Iterations**

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# ENDNOTES

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