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Agile Retrospectives

Making Good Teams Great

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Chapter 3

Leading Retrospectives

This chapter is about the role and skills of a retrospective leader. You don't need to be a professional facilitator to lead an iteration retrospective, but you do need basic facilitation skills. To learn the skills, you need to understand the role, practice, and seek feedback.

As a retrospective facilitator you may follow the content, but your primary responsibility is the process. When facilitators talk about process, they aren't talking about a heavyweight methodology. *Process* means managing activities, managing group dynamics, and managing time [Sch94]. Retrospective leaders focus on the process and structure of the retrospective. They attend to the needs and dynamics of the group and help the group reach a goal. Retrospective leaders remain neutral in discussions, even when they have strong opinions.

When the content involves your own team, it's easy to get caught up in the discussion. It's tempting to jump into an engaging conversation, especially when you care about the topic. But, if you're immersed in the content, you can't pay full attention to the process. Wait a beat to determine whether your thoughts are necessary. Most often, your team will do nicely without your input. The risk of giving input is that when the leader jumps in too often, it quashes group discussion.

Participants, on the other hand, focus on the content, discuss, sometimes disagree (though not disagreeably), and make decisions. Participants aim toward a goal and manage their own thoughts, feelings, and responses so they contribute positively to the conversations and outcome.

TIP: When to Offer Content Expertise

You may have important content to offer that no one else in the group has. When that happens, tell the team you are leaving the retrospective leader role temporarily to contribute to the discussion. Hand your marker to another team member to symbolize that you are not in the facilitator role while you participate. (Just make sure you get the marker—and your role—back.)

3.1 Managing Activities

Every retrospective design includes activities—such as creating working agreements, building a timeline, brainstorming, and prioritizing—to help the team think together. You'll need to introduce each activity, monitor the room during the activity, and debrief the activity when it's done.

Most people want to know something about the purpose of an activity before they begin. Give a broad sense of the territory the team will explore without revealing the details of what will happen or specifying what the team will learn.

TIP: Introducing Activities

The first time you use an activity, write a script so that you remember what to say and don't garble the instructions or leave something out.

Once you have your script, practice saying it aloud. Saying the words is different reading them or thinking them. As you hear yourself give the instruction, you'll notice where you stumble and where even you can't follow the instructions. Then you can refine your script and practice again.

You may not follow the script in the end, but preparing and practicing will help you describe the activity clearly and concisely.

Here's an introduction for an activity to re-create the timeline of a release: "To understand our iteration we need to tell the whole story from everyone's perspective. We'll create a timeline that shows events

that happened during the project. After we have a timeline as complete as it can be for now, we'll look for interesting patterns and explore puzzles."

This tells you about the territory of "understand our iteration," and lists the steps at a high level: "create the timeline," "look for interesting patterns," and "explore puzzles." It doesn't tell your team exactly what the outcome will be. That's for the team to create.

Most people (even really smart people) can't absorb detailed instructions for a multipart activity. Give the details for each part, just in time. For the timeline the details of the first steps are as follows: "Let's get into groups of two or three. In your group, brainstorm all the events that took place during the release. An event doesn't have to be a milestone—it can be anything that happened on the project." After giving the instructions, ask for questions about the task. Pause. Count to ten. Someone will have a question—wait for it.

As the retrospective leader, you have two tasks during an activity: be available to answer questions about the activity, and monitor the room.

While the group is working on an activity, listen to the noise level. Lots of conversation is an indication of good energy. It's also a clue that people are done with a quiet activity or need more time for a discussion activity. For an activity that involves writing or individual work, conversational buzz indicates that people are done and have started talking to their neighbor. If it sounds like there's still lively conversation at the end of a discussion activity, check to see whether people need more time. Of course, the sound of lively conversation may mean that people have finished the task and are talking about the latest movie.

Debrief every activity. A debrief helps your team examine their experience and extract insights. They'll make conscious connections and form new ideas. Debriefing each activity builds toward the insights and decisions of the retrospective.

So, it's important to debrief. Now how do you do it?

Here's a simple, four-step method to debrief almost any activity [[Sta97](#)]:

1. Start by asking for observable events and sensory input. "What did you see and hear?"
2. Ask how people responded to those events and inputs. "What surprised you? Where were you challenged?"

3. Ask for insights and analysis with questions, like “What insight do you have about this?” followed by “What does this tell you about our project?” These questions help people formulate their ideas and connect the activity to the project.
4. After you’ve established the link between the activity and the project, complete the learning cycle by asking group members how they will apply their insights: “What’s one thing you might do differently?”

Notice anything familiar about this? It follows the same flow as the retrospective structure (gather data, both facts and feelings; generate insights; and decide what to do).

There are lots of other ways to debrief (see Appendix B, on page 152 for additional ideas). This is a good place to start.

For a five- to twenty-minute activity, spend 50–100% as much time on debriefing as on the activity. So for a ten-minute activity, allow five to ten minutes for debriefing.

3.2 Managing Group Dynamics

Most of the time managing group dynamics in a retrospective means managing participation: making sure people who have something to say have the chance and making sure people who have a lot to say don’t dominate. Watch out for people who are talking more (or much less) than others. Make an opening for the quieter team members by asking to hear other opinions. Notice when someone looks as though he or she was about to speak but was cut off. Ask whether he or she has something to say. Create an opportunity without putting people on the spot or demanding an answer [Der03a].

To draw out quieter people, try saying something like “We haven’t heard Leigh and Venkat yet. What would you add?” Be willing to accept a pass.

If someone just won’t shut up, be direct (in private). If you’ve observed the pattern, talk to the person before the retrospective. Describe your observations, and describe the impact on the team—other people have stopped participating. Ask him or her to hold back. If the private conversation doesn’t work, be direct in the retrospective. When one team member is first to speak on every question, hold up a hand and say, “We’ve heard from you on every question; let’s hear from some

other people.” Keep your tone neutral. An emphatic delivery—“We’ve HEARD from YOU on EVERY question”—conveys blame and won’t help the retrospective.

Managers won’t be in every retrospective, but when they are, they are particularly prone to dominating the conversation. It’s not always their fault—if team members hold back when a manager is in the room (for whatever reason), the manager tends to fill the dead air. Meet with managers before the retrospective. Coach them on appropriate participation. Ask them to let others talk first, acknowledge the contributions others make, and be careful how they disagree. “I see it differently” preserves participation. Statements like “You’re wrong,” “You just don’t understand,” “You’re not listening to me,” and “I disagree” quash participation or lead to confrontation. Neither one is good.

Here’s how one retrospective leader handled a talkative manager: Rajiv, a project manager was a high-energy, verbal guy. And he was excited about the project. Jess met with him before the retrospective to discuss participation. Rajiv worried he’d forget to wait for others to speak first. Jess and Rajiv agreed on a signal: if he spoke out of turn, Jess would walk over and stand next to him. They never used the signal. Just knowing it was there was enough to help Rajiv wait.

TIP: Strategies for Helping Your Team Move Forward

Sometimes teams become stuck. When that happens, you have options as a retrospective leader.

You can help restore their creative juices by asking questions such as these:

- What have we tried before? What happened? What would you like to happen differently?
- If we had that, what would we gain?
- Have you ever tried this a different way? What happened?

You can ask for more opinions, especially from people who have been thinking more than talking.

You can suggest additional research before committing to a solution.

You can take off the retrospective leader hat and offer content knowledge from personal experience.

You could tell the team what to do, but only if you want to cheat their learning.

After managing participation, the next most common issues are violating working agreements and blaming. Both have negative effects, so you don't want to let them pass unnoticed.

Sooner or later, a team member will violate a working agreement. Humans have good intentions but fall back into old patterns. When they do, remind your team of their working agreements. If you allow violations to continue without comment, team members get the message that working agreements are optional. Optional working agreements have no value. It's everyone's job to monitor working agreements.

Blame starts a downward spiral of defensiveness and counterblame that will torpedo a retrospective. Listen for "you" language ("You broke the build!") and labeling statements ("You're immature!"). Both signal blame. Blame hurts the retrospective by distracting attention from real problems.

Encourage "I" language. "I" language centers on the speaker's observation and experience, rather than labeling the other person. When you hear blame or personal criticism, intervene and redirect the discussion to the content.

Here's how one retrospective leader handled a blame: during the platform expansion retrospective, one team member blamed another for breaking the build. "We'd have met our target if it weren't for you!"

"Hold on!" the retrospective leader said, "can you say that using 'I' language?" The team member thought for a while and then said, "I am angry that we missed our target because we had so much trouble fixing the build." Then the team was able to look at bigger issues with the build without blaming one individual.

Describe what you've seen and heard: "I'm hearing labels and 'you' language." Describing the behavior causes people to pause and consider what they're doing.

Group dynamics include team member interactions and emotions. You aren't responsible for other people's emotions, but as retrospective leader, you are responsible for keeping the session productive. And that

means you need to be prepared to handle emotional interactions and situations.

Most interactions and emotions help the group move forward. Some don't. Here are some challenging group dynamics and interactions to watch out for—and what to do about them. With any luck you won't encounter all of these in one retrospective ;-). If outbursts are the rule on your team, something else is happening. Retrospectives can't solve every problem; if the issue is deeper than normal team friction, contact your HR representative for resources and guidance.

When people have been bottling up their emotions, they come out in funny ways: people cry, shout, stomp out of the room, laugh hysterically, or clown when the topic is serious.

Before you jump in to fix things, notice your own response. It's easy to focus on comforting one person and lose track of the goal and the needs of the team. In a retrospective, your primary responsibility is to the interactions of the team as a whole, not to individuals. That doesn't mean ignoring what's going on with individual emotions; it means dealing with emotions in a way that is helpful and respectful to the team and the individual.

Here are some strategies that have worked for us and can work for you. Having a mental picture of how you'll respond gives you more options in the moment. So, think of the outburst that scares you the most, and mentally rehearse using one of these strategies. Outbursts are unsettling, but they don't have to derail the process. If you think you could never do something like this, remember that one of the Retrospective Goddesses started out as a programmer.

Tears Offer a box of tissues. When the person is able to speak, ask, "What is happening for you? Can you share it with the group?" Pause. Given time, the person often shares something heartfelt (and usually relevant) about the topic under discussion.

Shouting In most places, when someone starts shouting, the rest of the people in the room stop participating. And that makes it unproductive for everyone. Intervene immediately. Hold up one hand as a stop sign, and say calmly but forcefully, "Hold it." Then say, "I want to hear what you have to say, and I can't when you're shouting. Can you tell us why without shouting?" Don't be surprised if the person responds, "I'm not shouting!" When someone is upset or excited, he or she may

not be aware of the rising vocal volume. There's no need to say "Yes, you are." Calling attention to the yelling is usually enough to stop it.

If your team member continues to blame or yell, call a break, and talk to the person privately. Let him or her know how the behavior is affecting the group. Ask for agreement to express emotion in a nonthreatening way. If the person is unwilling, ask (don't tell) him or her to leave and return when he or she has more self-control.

Stomping Out When a team member stomps out, let him or her go. Ask the team, "What just happened?" They will have an idea. Ask whether it is possible to continue without the person who left. Most of the time, they'll say they can continue, though they may need to talk about the departure.

If this happens more than once, another issue is at play. Talk to the individual outside the retrospective.

Inappropriate Laughter and Clowning It is great to have fun in a retrospective. And people may use laughter and humor to deflect from a sensitive topic. When the laughter has an edge or your team repeatedly avoids a topic, it's time to step in. Make an observation, and ask a question: "I've noticed that every time we get near this topic, someone tells a joke. What's happening?" They'll tell you and engage the topic.

Also watch for two other types of situations. They aren't outbursts, but they are worth noticing.

Uncharacteristic Silence When a team that has been voluble goes quiet, something is going on. Again, step in with an observation and a question: "It seems to me that the group is being awfully quiet. There was a lot of energy and conversation earlier. What's going on now?" Your team may just be tired and need a break. Or they may be unsure how to approach a topic. Once you ask the question, someone will figure out how to broach the topic, and the proverbial dam will burst.

Of course, the fact that a team goes quiet may not mean anything. They may be thinking, tired, or simply a quiet group. When the silence is sudden or out of character, it's a clue worth following.

Currents Beneath the Surface Fidgeting and intense side conversations may indicate something going on just beneath the surface. Again, ask the group what is going on. They will tell you.

Here's how one retrospective leader handled a sudden disturbance in a retrospective: During an off-site release retrospective for a team build-

ing network infrastructure, Lindsey noticed the manager take a call on his cell phone, even though the working agreements prohibited calls. He left. When he came back in the room, he had a quiet side conversation with one person, then another. Laptops opened. Everyone was still trying to track the discussion in the room, but something was distracting them. Lindsey stopped the discussion and asked, “What’s happening?” A team member explained that there was a crisis back at the office and the sales manager wanted them to come back and fix it. They wanted to stay in the session but were distracted by his request and perceived urgency for the customer. Lindsey and the team discussed their options: stop the retrospective and reschedule it, ignore the request, or try to do something from where they were. The team set a timebox for immediate problem solving in the room and then resumed the retrospective.

Lindsey didn’t blame anyone for not following the agreements. In most cases, naming the behavior, commenting on it, and asking the group what’s happening will diffuse the situation and shift the dynamic.

Whew! After all that, managing time will be easy!

3.3 Managing Time

Here’s the rub: when you’re leading a retrospective, you should respond to the needs of the group, *and* you need to pay attention to time and stay within the timebox all at once. It’s a dilemma.

Bring a timepiece that will allow you to time activities. We sometimes lose track of time, so we’ll often jot down the start time so we know when to end an activity. Or you can use a stopwatch to time activities.

If you’re working with a group much larger than eight people, you’ll need a way to cue people that it’s time to move to another step. Use a bell, chime, or some other not-too-obnoxious sound when it’s time to come together as a group, debrief, or provide additional instructions for an activity. Yelling over the group isn’t effective and sends the wrong message. Whistling works to gain attention, but not always with the desired effect. Duck calls, cow sounds, and other animal sounds work in groups of less than ten (the sound doesn’t carry in larger groups), but well... they don’t add to your dignity (if you care about such things).

When the discussion still has energy yet the time you’ve planned has run out, ask the group what they want to do: “I’m concerned that if

we continue this discussion we won't meet our end goal. What do you want to do?" The group will refocus and move ahead, or they will tell you this conversation is more important than the original goal. Put the decision in the hands of the group.

Usually it's pretty clear. When it's not, look for a compromise such as timeboxing the discussion or agreeing to revisit the topic later (in the retrospective or afterward).

Be prepared to swap to a shorter activity if time is running short. You still have the responsibility to meet the goal of the retrospective—identify and plan for experiments and improvements.

3.4 Managing You

In addition to managing activities, group dynamics, and time, you need to manage you.

Staying aware of all these team and interpersonal dynamics may seem overwhelming. The key to managing group dynamics is not technique (although it helps to have strategies) but in understanding and managing your own emotional state and responses. If you aren't managing your own state, no technique or strategy will help. When emotions are high, your team needs someone to stay outside the turmoil. That someone is you, the retrospective leader.

If you feel your anxiety or tension rising, take a deep breath. Call a break if you need to do so. Your anxiety is a clue that you need to sort out what to do next to serve the group. Remember, you didn't cause the emotions in the room, and you don't have responsibility to make everything and everyone happy and nice.

During the break, take a moment to shake out your hands and feet to release tension and get your blood flowing again. Take three deep breaths. This may seem like superfluous advice; but when people are tense and anxious, it reduces blood flow to the brain... which reduces the ability to think clearly, which contributes to anxiety and tension. You see the picture. Oxygen to the brain is a good thing. It helps you think. Once your brain is oxygenated, ask yourself these questions:

- "What just happened?"
- "How much was inside me, and how much was outside me?"
- "How did the group get here?"

- “Where does the group need to go next?”
- “What are three options I have for next steps?”
- “What will I offer the group?”

These questions will help you re-center. And then you can use one of the strategies for managing group dynamics. As long as you have a strategy, you won't have to stand there frozen, not knowing what to do. Over time, your comfort in dealing with charged emotional situations will grow. Find a mentor whom you have seen manage emotions in groups. Work with your mentor to gain confidence and learn more options for handling emotional situations. And remember to breathe.

3.5 Taking Your Skills to the Next Level

If you enjoy helping groups think together, increase your skills as a facilitator and augment your toolbox. Consider deepening your skills in these areas:

- Working with activities. There's an art to developing, introducing, and debriefing activities and simulations to help people think and learn together. In addition to using activities in retrospectives, using activities and simulations is helpful if coaching, teaching, or training is part of your job.
- Helping groups reach decisions. There's a huge body of knowledge related to how people really make decisions (it's not entirely by logic, by the way). You can improve the quality of decision making in your group by knowing what decision process fits the situation and how to help the group converge on a decision.
- Understanding and managing group dynamics. Learning about people and people in groups is a lifelong study. Your skills in this area will help you build and nurture high-performing groups as well as run a darn good retrospective.
- Increasing self-awareness. Self-awareness is the foundation of personal effectiveness. You can't go wrong learning more about yourself and learning how you respond under stress. Gaining awareness of habitual patterns is the first step to being able to choose an appropriate response rather than simply reacting.
- Creating and using flip charts. Don't use any more of those scribbled flip charts that no one can read from more than a foot away!

If you work with groups, learning how to present information visually helps the group process information quickly and efficiently.

These skills apply in many situations, not just retrospectives. Your understanding of group process and your ability to help groups succeed will help you succeed, too.

Practice facilitating other kinds of meetings. If you belong to a volunteer group or some other organization outside of work, offer to facilitate a meeting or subcommittee. It's low risk and will give you experience. Practice in managing the dynamics of any meeting will pay off in managing the dynamics in a retrospective.

Observe other people who are effective at leading meetings and working with groups. Watch how they interact with people and how they respond when a session isn't going smoothly. You may not want to use someone else's exact words, but you can analyze what you see and adapt it to fit your own style.

Practice with feedback is the best way to learn facilitation skills [Der02]. Ask someone you trust (and who has some facilitation awareness) to observe as you facilitate. If you have a specific area you want to learn about, ask your observer to pay special attention to that aspect of your facilitation. Or you may ask your trusted observer to look for areas where he or she senses you have habits you aren't aware of.

For resources on increasing your facilitation skills, see Appendix D, on page 156.



You are probably an expert at what you do now. Facilitation draws on different skills than most of us develop working in software. Facilitation also requires a different perspective. It takes time and practice to feel comfortable with new skills. Give yourself time, manage your expectations, and find mentors. You'll inspect and adapt your facilitation, too.

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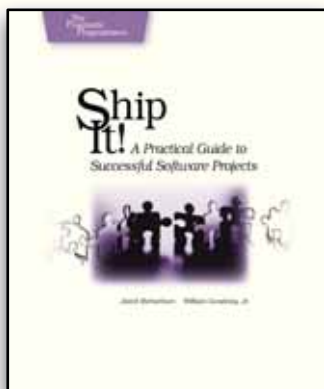
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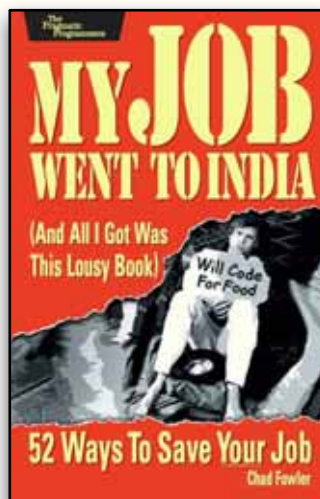
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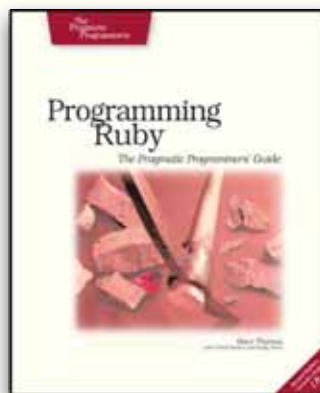
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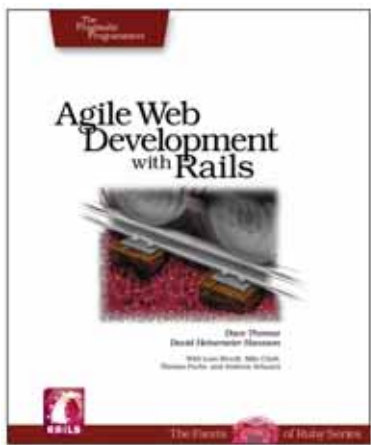
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