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Liftoff, Second Edition

Start and Sustain Successful Agile Teams

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Liftoff

Second
Edition

Start and Sustain
Successful Agile Teams



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Liftoff, Second Edition

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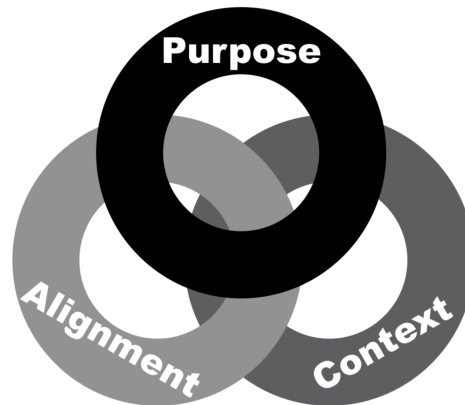
Charter a Clear Team Purpose

When you have a sense of purpose for your work, your commitment deepens, your momentum increases, and your performance elevates. In his book, [Drive: The Surprising Truth About What Motivates Us \[Pin09\]](#), Daniel Pink calls out autonomy, mastery, and purpose as the three primary human motivators. In their book, [Wisdom of Teams: Creating the High-Performance Organization \[KS99\]](#), Jeffrey Katzenbach and Douglas Smith list common purpose as the top characteristic of effective teams. And in [Extraordinary Groups: How Ordinary Teams Achieve Amazing Results \[BR09\]](#), Geoffrey Bellman and Kathleen Ryan support this view in their model of what extraordinary groups need. They write that shared purpose is “the reason we come together...where collective energy and capacity combine to achieve something that could or would never be done by individuals alone.”

As described in [Setting Conditions for Optimal Team Learning, on page ?](#), a team comprises a complex adaptive system that exhibits a set of conditions: containers, differences, and exchanges. Purpose provides the container for the work. It reinforces group identity. A clear understanding of purpose is critical when you work with others to achieve a common goal. In this chapter we look at purpose, the first of the three critical elements of an agile team charter.

Understanding Purpose

Purpose is composed of three elements: a product vision, a team mission, and a set of mission tests. The product vision describes the desired future your product will help to create. The team mission describes how your work contributes to creating that future. Mission tests help assess the team's progress toward that future. Taken together, these components provide inspiration and meaning for the work.



Product Vision

Your organization and your team need a reason to do the work. The product vision provides a shared picture of the desired future when your customer is using your product or service. It serves as the focal point for making a new reality. An inspiring product vision amplifies the significance of the work and engages the team. In contrast to an organizational vision that sets business direction, a product vision applies only to a single product and describes an external view of the product's impact, including:

- How the product will change the user's world: *customer service representatives will experience their work as highly productive and no longer engage in wasteful, tedious work.*
- What problem the product solves or what benefit the product delivers and to what people: *customer service interactions will continuously gain customer loyalty and market share.*
- The reason for the team and its work effort to exist and the overarching impact you want to manifest: *our highly productive customer support representatives create customer loyalty and repeat business through the quality and speed of their interactions.*

A product vision illustrates the ultimate expression of customer value. It's why you support this work.

The product manager creates and owns the product vision, and sponsors, funders, and strategic decision makers support the product manager in this work. This group might develop the product vision by following the next steps

on the product roadmap. It might envision something new to disrupt the marketplace. In any case, the product manager drives the effort.

Team Mission

The team mission describes your team's unique contribution toward achieving the product vision. If the product vision clarifies *why*, the team mission clarifies *what* the work is. It follows the agile maxim of *just enough documentation* by providing just enough information to achieve focus.

A useful mission establishes five critical pieces of information:

- The product's customers: *for XYZ Company's customer service reps.*
- The team's actions and outcomes: *the CSR project will develop and deploy.*
- What the product or service the team will deliver: *a software system for tracking customer interactions and concerns.*
- The differentiating attributes of the product or service: *the product will increase the speed of satisfying service to customers.*
- The value of the product to the customer: *this new system will enable customer service representatives to focus on customer interactions and gain greater ability to connect customers with the solutions they need.*

Each team mission is unique. It describes how this team will turn the product vision into reality. It clarifies boundaries for the work the team will perform. It does the same for everyone associated with the effort. It clarifies the most important nonfunctional requirements. It both directs and limits tactical choices. The mission evolves over time as the team and others learn more about customer and business needs. The team commits to accomplishing the mission.

A group of key product decision makers develops a rough draft of the team mission. The group bases the draft on its understanding of what it'll take to please customers and help the business thrive. The team knows the most about the effort and skill it'll take to do the work. The product manager and team share ownership of the team mission. In collaboration, they define the first draft and all later versions as they evolve.

Occasionally, many teams contribute to a common product vision. The unique missions of these teams combine to achieve the vision.

Mission Tests

Mission tests specify the indicators of progress toward successful mission achievement and identify the critical few indicators of progress. Mission tests itemize the qualitative and quantitative intentions that help define progress toward being done.

The team and product manager execute mission tests on predetermined dates. Through the tests, everyone examines assumptions and hypotheses about the work of the mission. For example, mission tests can measure:

- Productivity improvement
- Strengthened capacity or capabilities
- Reduced turnover costs
- Other cost-reduction measures
- Other contributions to the bottom line

Mission tests can assess internal or external progress. Internal tests describe what the team will gain or learn as a result of the work. For example, internal tests might measure:

- Downward trends for defect rates released into production
- Increases in team members' reports of overall job satisfaction
- Higher satisfaction with iteration and release product demos, reported by the product manager and stakeholders

External tests focus beyond the boundaries of team authority and responsibility. For example, external tests might measure:

- Instances of the product in use
- Customer satisfaction rates
- Market penetration
- Public perception of the brand
- Revenue goals
- Other top-line improvements
- Cost savings

Examples of specific external test markers include:

- 20 percent reduction in support calls for the product by FYE
- 10 percent increase in customer satisfaction ratings by Q3
- \$25K savings over the first quarter by eliminating wait-time waste while CSRs look up information for customers

Like the product vision and team mission, mission tests clarify understandings about desired outcomes. Core teams use mission tests to inform decisions about their work. When teams check their mission test results, they take the time to learn and plan. They can plan for continuing on the same path, or choose to adapt based on the new information.

In the team chartering workshop, the product manager proposes rough-draft mission tests. Product managers, the core team, and stakeholders share ideas and refine the tests. Team members consider their collaborative capacity and capability. The team decides if it can commit to the mission tests as ongoing metrics. The team and the product manager jointly own the mission tests.

How to Facilitate Agile Chartering for Purpose

Developing a first draft of the team's purpose requires two meetings: a prework session and a team chartering workshop. The first meeting is a prework session. In this meeting, product managers, sponsors, and key stakeholders develop a preliminary purpose for the team to review, clarify, and refine. In the second meeting, the product manager takes the preliminary document to a team chartering workshop where the whole group agrees on a first-draft purpose it can embrace.

Here we offer facilitation outlines and sample activities for both of these meetings. We include suggested activities only for the portion of the team meeting that refines purpose. You'll find expanded activities for facilitating the alignment and context elements of the team charter in [Chapter 6, Create Coherence by Chartering Alignment, on page ?](#) and [Chapter 7, Charter Context to Influence Work, on page ?](#).

Conducting the Prework Session

The work sponsor and strategic decision makers start the agile team chartering process by preparing a preliminary document with all three elements of purpose: the product vision, the team mission, and the mission tests. The first draft serves as a starting point for the team and others in the team workshop.

Review [Table 3, Chartering Participants and Roles, on page ?](#) to create an invitation list for the prework session.

Following is a sample agenda for the prework meeting and suggested activities.

Sample Agenda (Prework Meeting)

1. Welcome and introductions
2. Review the agenda
3. Discuss participant perspectives
4. Develop preliminary product vision
5. Develop preliminary team mission
6. Develop preliminary mission tests
7. Review for consistency
8. Clarify the next steps and wrap up

Activity 1: Introduce the Product and Elicit Stakeholder Perspectives

Welcome the participants and make introductions. Introduce the product and ask each participant to clarify his or her views on why the business will support the product. Discuss similarities and differences in perspectives.

Lead the group to seek answers to questions such as:

- How will this product affect the overall business strategy? What impacts can you imagine, both positive and negative?
- Which parts of our market will the product affect and how?
- Will the product require internal and/or external changes in people, development processes, or technology, or all of the above?
- Will team success require changes in organizational structure, staffing, business processes, funding, and so on?
- Which parts of the organization will be affected, if any?
- How will the product owner and team recognize those effects?

Develop your own list of questions. Choose a few that fit from the samples. Add questions specific to your business aspirations and challenges. To avoid overanalyzing, limit your list of questions to no more than ten.

What Does Your Product Do?

Esther Derby, coauthor of [Behind Closed Doors \[RD05\]](#) and [Agile Retrospectives: Making Good Teams Great \[DS06\]](#), and principal at Esther Derby Associates, developed this useful analogy for thinking about product visions. In this sidebar from her blog,^a she illustrates the difference between vision and mission by focusing vision on the customer's/user's experience.

When it gets dark, I turn on a light.

I can work, cook, read—long after sundown. I can see where I'm going, avoid the dog toys on the floor, and not run into furniture. If I need something in the house, I can find it. The flip of a switch makes many things possible and solves many problems.

When I ask developers and engineering managers what their software product does, often, they don't tell me. They regale me details equivalent to explaining the production of electricity, starting from mining coal until the switch closes a circuit. It's all about the technical how.

Your customers may be interested in the technical how. They certainly want to know the what—what is possible on their side of the metaphorical light switch when they use your product.

It's useful for the team to know, too. A short statement that answers three questions clarifies purpose and focuses attention:

- What benefit does our product create?
- What problem does our product solve?
- For which group of people?

This clarity informs priorities, and helps people defer non-essential features. It helps keep focus on who will use the software, and how it will help them. When every member of the team can articulate the answer to these questions, they can make better decisions—and that almost always results in a product that is a better fit for function.

a. www.estherderby.com/2015/11/what-does-your-product-do.html