



The Retrospective Handbook

A guide for agile teams

Patrick Kua
Foreword by Diana Larsen

The Retrospective Handbook

A guide for agile teams

Patrick Kua

©2012 - 2013 Patrick Kua

1 Facilitating Retrospectives

A direct contributor to the effectiveness of a retrospective is the quality of the facilitator and how they facilitate the retrospective. In this chapter, I will deal with a number of a issues particularly relevant to facilitating retrospectives over other meetings. If you are unfamiliar or uneasy with facilitating, the [next chapter](#) covers advice to help you.

1.1 Independent or Non-Independent

In an ideal world, all team retrospectives would have an independent facilitator to run their retrospectives. A facilitator outside of the team maintains neutrality and prevents discussions and outcomes being unintentionally biased. In reality, finding an external facilitator for agile retrospectives is difficult due to cost or time constraints. Teams may also find they are the only people in their organisation that run retrospectives, making it impossible to find an experienced retrospective facilitator from anywhere else within their organisation.

Predicting the impact that a non-independent facilitator can have on the retrospective is difficult. The effects could be subtle, such as placing positive emphasis on a

decision that they approve of. At other times, it could be obvious, for example if the facilitator skips discussion points they do not think are important, or spends more time on points they consider important. (I have witnessed all these behaviours.) Note that facilitators playing multiple roles may be completely unaware of their bias or how it affects a discussion during the retrospective.

A major reason for seeking an independent retrospective facilitator is to avoid a situation similar to the one I once experienced.

I'd just joined a team that had been working together for a while. They held retrospectives every two weeks, organised and facilitated by their Project Manager. As the newest team member, I just observed how he ran the retrospective. I remember he pointed at one person at a time and asked for their input. He turned to write their input on to a flip chart before turning and pointing to the next person. If he didn't like the answer, he'd ask that person to think of another one. It took a good 15 minutes for him to work around the group and collect only one point from each person.

Combining the facilitator role with a leadership position is troublesome as it sends mixed signals to the group about what is acceptable. The facilitator role amplifies authority, and often reduces safety for participants and means that they are less willing to explore issues in depth.

Some teams prefer a facilitator from within their ranks as they claim that it increases safety because everyone knows everyone else in the room. This increase in safety is only useful, however, if the facilitator can separate their own opinion from their role as a facilitator during the retrospective.

In one organisation I worked with, two teams swapped a retrospective facilitator with each other so that everyone could focus on being a team-participant and didn't have to worry about who was going to facilitate.

1.2 Conflict of Interest

If you find yourself acting as a team member as well as a facilitator, you will inevitably need to deal with the conflict of interest that arises. The best thing to do is, during the 'Set the Stage' phase, declare your conflict of interest. Explain that you are facilitating and will sometimes have opinions that may interfere with your facilitation, however hard you try to keep them separate.

Encourage people to speak up if they feel that you are influencing rather than facilitating and be prepared to be pulled up for it. Be aware that just because you have given participants permission to pull you up does not guarantee that they will. To a certain extent, this depends on how your team or organisation views and respects positions of authority.

Use a visual cue to distinguish your different roles of ‘facilitator’ and ‘participant’. One facilitator I saw wore a brightly coloured vest when they were acting as facilitator and quickly removed it when they wanted to express something as a participant. I have seen other teams use a large badge or a hat to help visualise the different roles.

If you cannot find any accessory to wear, try using different physical locations to ‘step in’ or ‘step out’ of role. At the very least, you should call out when you are expressing your opinion as a member or not. Another alternative is simply to agree with the other participants that the facilitator should focus on facilitation only and not contribute opinions to the retrospective at the risk of obscuring the whole picture.

1.3 Be Decisive

More on this in the full version.

1.4 Develop Your Facilitation Skills

More on this in the full version.

1.5 Form Effective Actions

More on this in the full version.

1.6 Spread the Retrospective Word

More on this in the full version.