Creating Great Teams

Second Edition

How Self-Selection Lets People Excel

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Adapting Self-Selection to Your Context

Self-selection is a powerful tool for building empowered teams, and though the core principles of self-selection are universal, its success depends on how well it's adapted to each organization's unique needs. In this chapter, you will discover how you can tailor the self-selection process to your culture, strategy, and team structure by reviewing a number of self-selection applications across industries and frameworks. We offer a collection of case studies that provide you with ideas on how to adapt self-selection to the evolving needs of your teams. You don't have to start with a blank piece of paper like we did; instead you can borrow from others who went before you and hopefully go on to contribute your own self-selection ideas to the growing body of knowledge.

Understanding Your Unique Landscape

Your context will be different, the only question is how? Self-selection is never a one-size-fits-all process; its effectiveness depends on how well you adapt it to your organization's specific landscape. The following sections outline the factors that will shape how you implement the self-selection process in your organization.

Internal Factors: Inside Your Organization

Internal factors within your organization play a pivotal role in shaping the self-selection process and its success or failure. These elements guide how you need to adapt the method to suit your specific context, with direct impact on how smoothly the process unfolds. Typically, internal factors fall into three main categories and these should be within your control or influence.

Your "Why" Behind Self-Selection
- *Purpose Behind Team Formation:* Your reason for forming new teams —whether it's strategic change, scaling up, scaling down, or enhancing agility—will shape your self-selection approach. Defining your "why" clarifies what success looks like.
- *Agility and Scaling Frameworks:* The scaling frameworks you use—be it SAFe, LeSS, Spotify, or others—will significantly influence the team structures that emerge from self-selection. The framework you follow provides a backbone for how flexible or rigid your team configurations need to be.

Team Dynamics and Methods
- *Team Configuration:* Consider the size, composition, and diversity of skills when crafting your teams. Are you working with small, highly specialized teams, or larger, cross-functional groups?
- *Dynamic Reteaming:* Some organizations embrace frequent, small team adjustments, while others undergo larger, infrequent changes. Understanding the rhythm and frequency of your team changes will shape how dynamic your self-selection process needs to be.

Organizational Culture and Values
- *Cultural Considerations:* The prevailing culture—whether hierarchical or autonomous—will impact how smooth or challenging your self-selection event may be. Cultures that value autonomy and collaboration will more naturally embrace self-selection, while more top-down environments might require careful management of expectations.
- *Leadership and Management Support:* The level of support from leadership can make or break the success of self-selection. Actively engaged leadership creates momentum, while hesitant or disconnected leadership can hinder adoption. Leaders must champion the process, reinforcing the value of trust and collaboration.

External Factors: Outside Your Organization

Factors beyond your organization also play a significant role in shaping the process. While these factors are much more outside your your control and influence, being aware of them and adapting accordingly is equally important. They influence how your teams are structured and determine the level of flexibility needed.

Market and Industry Dynamics
- *Responding to Market Shifts:* The pace and nature of your industry play a role in shaping the self-selection process. Fast-moving sectors may need more frequent reteaming, while stable industries can accommodate more fixed team structures.

External Team Members
- *Integrating External partners:* When working with external partners, contractors, or mixed teams across different organizations, the incentives, contracts, and goals of these external members can affect your team dynamics. Clear communication and understanding of the roles and expectations of external team members is crucial to successful self-selection.

Regulatory and Compliance Requirements
- *Governance:* In industries with strict regulations or compliance standards, such as financial or government organizations team compositions may need to account for legal or procedural constraints.

Geographic Distribution
- *Location:* The availability of talent in different regions or time zones can affect how teams are formed, especially if you're working with remote or globally distributed teams. This may impact how you approach self-selection in terms of location and skill availability.

What Sparked Your Self-Selection?

While the internal and external factors we listed might shape your self-selection process, it's also crucial to identify what triggered your desire to self-select into teams in the first place. Understanding the specific catalysts allows you to tailor the process and your approach. For instance, selecting teams due to company growth will significantly differ in approach, tone, and speed from selecting teams during downsizing. Similarly, forming teams with newly hired people requires a different strategy than working with long-tenured staff. Recognizing and categorizing your own "spark" will clarify the adjustments you need to make.

Some common triggers we've seen that prompt organizations to adopt self-selection include changing company priorities, organizational transformation, adjusting to growth or downsizing, mergers and acquisitions, technological migrations or platform changes, innovation and disruption, geographic or market expansion, and product lifecycle completion.

Self-Selection in a SAFe Environment

In Australia, Em Campbell-Pretty, SAFe fellow and author of *Tribal Unity - Getting from TEAMS to TRIBES by Creating a One Team Culture [Cam12]*, took on the challenge of applying self-selection within the Scaled Agile Framework (SAFe) to form Agile Release Trains (ARTs) at a large financial institution.[1]

Following ideas from the first edition of this book,[2] the team from Pretty Agile worked with the bank's teams to let people choose their own roles and missions, all while working within SAFe's structure. Em remembers:

> *Those who know me will not be at all surprised to learn the first thing I did once there was agreement to use self-selection was buy and read Sandy and David's book,* Creating Great Teams: How Self-Selection Lets People Excel. *I had heard Sandy talk on the topic some time back, and my colleague had previously used the technique, so I wasn't walking in blind. My experiences with watching people bastardizing SAFe made me want to stick as closely to the book's guidance as possible. Specifically, we chose to keep the number of constraints to the absolute minimum.*

The Challenges

During the formation of the Agile Release Train, Em and her team faced three major hurdles:

Moving from preassigned to self-selected teams.
- The transition from preassigned team compositions to self-selection shifted the focus from fixed roles to defining team missions and configurations. This created initial tension within the organization, particularly around specialized roles such as Agile Facilitators and Product Owners. The organization diverged from SAFe's typical role allocation, allowing Agile Facilitators to contribute directly to team objectives in addition to their traditional roles.

Finding the balance between component teams and stream-aligned teams.
- To keep things aligned with company strategy while still giving teams autonomy, they blended the two team structures. For example, in the Campaign Innovation and Capability Development teams, they devoted some of their capacity to specialized tasks. This delicate balancing act required teams to manage both broad objectives and niche technical expertise.

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1. https://prettyagile.co/SS-Prep
2. https://www.pragprog.com/titles/mmteams/creating-great-teams

Integrating in-house and offshore talent.
- One of the toughest parts was bringing together in-house and offshore team members. Self-selection was key in forming six well-rounded, multidisciplinary teams that could navigate the challenges of distributed workforces.

The Solution

To overcome these challenges, they made a few creative adjustments to make self-selection work in a SAFe environment:

- *Guided Flexibility:* They stuck to the overall self-selection guidelines but stayed flexible. This helped them blend SAFe's structure with the freedom of self-selection, allowing teams to make their own decisions while working within the framework.

- *Role Tweaks:* Certain roles, such as those in the Pipeline and System teams, were excluded from self-selection. This was necessary to maintain critical role-specific allocations essential to ART effectiveness, demonstrating that self-selection can still succeed within a framework that requires predefined roles.

- *Hybrid Team Structures:* The organization navigated the debate between feature vs. component teams by embracing a hybrid approach. They balanced agility with the need to address technical debt and maintain productivity, particularly for teams transitioning to kanban.

- *Smart Role Assignments:* Deciding how to handle specialized roles like Scrum Master and Product Owner was tricky. They split these responsibilities, letting Scrum Masters handle team facilitation while contributing to other work. This approach suited SAFe's pragmatic stance and the organization's size and agile maturity level.

- *Analytics-Driven Product Ownership:* By putting senior analytics experts in Product Owner roles, they ensured that team missions were aligned with the company's data-focused goals, keeping everything strategically on track.

- *Compromises for Integration:* Teams like Campaign Innovation and Capability Development integrated technical debt and innovation work into their workload, ensuring alignment with ART objectives while still allowing for focused team-driven outcomes.

The Outcome

The self-selection process allowed six multidisciplinary teams to form smoothly, balancing autonomy and structure. Since then Em and her team at PrettyAgile have run many self-selections with SAFe and have incorporated it into their 6-day Agile Release Train Quick Start process.[3]

This case study shows that even in highly structured environments like SAFe, self-selection can work with the right mix of flexibility and planning. The big takeaway? You can make self-selection thrive in any framework if you're willing to adapt and think outside the box.

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3. https://prettyagile.co/QS-PIP