

The
Pragmatic
Programmers

Creating Great Teams

Second Edition

How Self-Selection
Lets People Excel



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Getting Ready

After you have the foundational elements in place for your self-selection event by conducting a readiness check, getting permission, and communicating the plan to your participants, it's now time to focus on the final details of planning the self-selection. With several days still to go before you let people choose their own teams and their own work, you need to finalize the rules and constraints, devise your facilitation plan, write your FAQs, and organize your materials and boards. At the end of this chapter you will be ready to go!

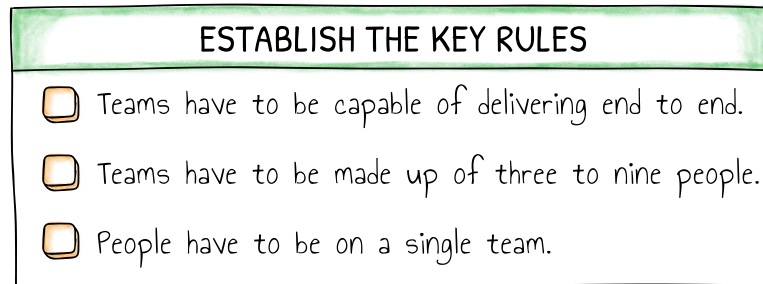
Step 1: Define the Rules and Constraints

Like anything in life, self-selection comes with rules and constraints, although we recommend keeping the number of self-imposed constraints to an absolute minimum. Preparing and confirming short and simple rules makes the problem of establishing new teams easier to solve for those involved. We believe that the more rules there are, the more complex (or even unsolvable) the puzzle can become.

The essence of self-selection is that you are entrusting people to solve a problem, which is why you need to make sure they have the freedom to do so within sensible boundaries. The right rules will provide the clarity people are craving, showing them exactly what you are asking from them and how they can “play” the game of self-selection.

Establish the Key Rules

We have only ever had three rules for the self-selections we have run and recommend you do the same:



Here's the reasoning behind our suggested three rules.

Keep Teams Autonomous

Teams have to be capable of delivering end to end.

You don't want to create a web of interdependencies. Teams are given autonomy, and you can't have autonomy unless people have the ability to do their work on their own. This means teams must have all the skills to work end-to-end. To become a self-sufficient unit they can't be relying on lots of people outside the team. This simply means that they need people with all the skills (or the ability to learn these skills) to move from an idea to a shipped product or feature.

One exception to this rule is if your organization has designed its teams around the Team Topologies framework.¹ In this case, you may need to change or update this rule for your teams. If you have platform teams, for example, they may not be delivering end-to-end and they should be designed to deliver their work whatever that looks like for them. As much as possible you are trying to minimize dependencies between teams, and regardless of the model that sits behind your team design, this idea should permeate through your design.

Keep Teams Small

Teams have to be made up of three to nine people.

Experience has shown us that smaller teams work best. This is a rule that appears to be true regardless of the selection method. The rule of three or more people for a team comes from the idea that while smaller is almost always better, two people is a pair and not really a team—so the minimum number of people on a team is three. We've also experienced universally that teams larger than ten become unwieldy and unproductive, and they often form subgroups that can introduce challenges and gaps.

1. <https://teampologies.com>

Agile experts often assert that teams should be made up of seven plus/minus two people;² and, even within that rule we have a preference for even smaller teams where possible. This encourages cross-functional collaboration and supports the concept of members wearing different 'hats' rather than only performing tasks within their respective professional fields (Examples include testers doing business analysis and developers volunteering to test.)

Small teams also make overall communication easier because there are fewer communication paths between team members. In fact, the number of communication paths increases exponentially as the number of team members increases and ten or more team members tends to become unsustainable creating the formation of smaller sub-teams.

We recommend that you set the maximum/minimum number of people as a clear constraint and to allow the teams to work out how they will fit within that constraint.

Keep Teams Together

People have to be on a single team.

Resist the temptation to split people across multiple teams. Having people part of one team is crucial, and though we have seen people try and rip their photo in two (or more) pieces to sit across multiple teams, this damages the team and the person as much as the photograph. We know from decades of research that multitasking and increased cognitive load are negatively correlated with performance, so give people the best chance of success by restricting them to join a single team. There tends to be one or two people who need to sit outside the teams in order to fulfill their role and to do the work they need to do. That's okay, but with your rules and constraints you can ensure this is an exception rather than the default.

In scenarios where people are divided among multiple teams, the challenge extends beyond multi-tasking. Often peak periods in both teams can overlap which means that people split across teams face simultaneous intense demands. This not only places unfair pressure on them but it also creates bottlenecks for the teams involved. As each team competes for the same person's availability delays become inevitable and no team receives the best possible contribution from the shared team member.

In our case, if people ask questions such as "Can we have half an extra person?" our answer is usually "Absolutely, if you think that this is the best

2. <http://www.infoq.com/news/2009/04/agile-optimal-team-size>

available option and fits the constraint.” As it turns out, those who have suggested 50% of a person’s time have always withdrawn that suggestion when they considered how this would work in reality, namely with the person usually having to attend twice the number of team meetings and often becoming the bottleneck when several teams ask them to deliver work at the same time.

Don’t Specify the Outcome Before You Start

We’ve frequently been asked (and always resisted) requests to specify up front the number of senior and/or junior members for each team. The intention of the request can be to ensure that the right amount of technical know-how is present and that there is an even distribution of the most experienced people across teams which is fair, however the addition of a constraint like one senior developer per team, can have the unintended consequence of making the team selection puzzle unsolvable.

If you did choose to take this additional rule on board and specify, for example, one senior developer for every team, you could easily find out that you just don’t have the right ratio in your organization to make that happen. This particular request also assumes that one senior person is interchangeable with another, which isn’t true of senior developers any more than it is of any other role.

A director of engineering at an Asia-Pacific company shared that convincing stakeholders to allow a self-selection event with minimal rules about team composition required significant effort. Some stakeholders were concerned that without strict guidelines—such as requiring a mix of senior and junior members, ensuring a senior architect on each team, or having a feature expert—the teams might struggle to be effective. Interestingly, these concerns mostly came from individuals outside the teams. In contrast, team members, particularly those with experience in both effective and ineffective teams, had a solid understanding of what their team needed to succeed

Not bowing to the pressure to add rules of this nature also prevents a highly undesirable outcome, that in which employees perceive that they’ve actually been selected into predefined allocations and it wasn’t self-selection at all. It’s our belief that the only thing worse than management selection is a stealth version of self-selection where people are led to believe they will self-select only to find out the decision wasn’t theirs at all, and due to the rules and constraints, their new position was effectively preselected and they could only step into their pre-allocated slot.

Be careful of hidden or implicit constraints: if there is anything you absolutely can't live with, such as more than a certain number of people on a particular team make it explicit. Sandy describes an interesting experience she had facilitating a self-selection event at a New Zealand bank:

We had a team that we were going to disestablish within the next 18 months and the bank did not want to budget more than three people on this team. We forgot to make this constraint explicit, probably because we thought very few people would choose this team anyway. Big mistake! Eight people wanted to be on the team and we had to explain during the self-selection that there was an additional constraint on just this particular team. It didn't go down well and we had to apologize for overlooking this. I think the main issue was that people thought that if there is one hidden constraint, how many others would there be? And if that is the case, is this really self-selection at all?

Step 2: Create a Facilitation Plan

By now you should have a better idea of how the day of self-selection might pan out. It's time to ensure that you have a solid facilitation plan in place. People can react strangely to new levels of autonomy, and while we've never tried simply putting people into a room and hoping they sort it out, we're confident it would not create a great outcome or experience for anyone. As the facilitator it's your job to provide the structure and boundaries for the event, and we highly recommend having a detailed plan for the day, with contingency plans included.

David describes how we came up with our first facilitation plan:

I remember standing in the Wellington Trade Me office overlooking the waterfront with a blank piece of paper. With a Sharpie in hand I said, "Well, we seem to have permission to do this now, or at least nobody is stopping us, but what are we actually going to do?" We looked at each other and said, "Um, I don't really know."

Originally we considered whether coworkers would email us their top three choices for teams they wanted to join in advance. If we ranked them, we could assign points to them and assign people to teams in that way. But then we thought, is that actually self-selection, or are we just dressing up management selection differently and with more information? And wouldn't people's requests change when they saw what others had done or new opportunities opened up? We needed everyone to be directly involved in the process. After all, this really was all about them.

So, we started scribbling things down and tried to come up with some kind of supporting structure and process that would allow us to do this. We knew it would have to involve people being present and making choices alongside everyone else as opportunities developed. This would not be just be another meeting!

Over time we've refined our facilitation techniques to guide groups through this iterative approach to self-selection and have incorporated learnings from our own experiences and those of others. Ten years of self-selection in countries all over the world, however, haven't changed the basic process and principles we started with:

From the very first self-selection event we were a part of, the high-level running order has usually followed these steps:

1. Welcome the participants and kick off the event.
2. Present the team missions and purpose.
3. Facilitate several rounds of self-selection (usually three to four timeboxes of ten minutes) each followed by a period to pause and get feedback.
4. Wrap up, close the event, and clarify what will happen next.

Over time we've refined our facilitation techniques to guide groups through this iterative approach to self-selection and have incorporated learnings from our own experiences and those of others. The process of working through a facilitation plan will cement a lot of the ideas for you and help you identify any gaps that you should address.

Key Principle: Do What Is Best for Your Company

Our overarching principle, as opposed to an additional rule, is always “Do what is best for your company.” It has proved incredibly important to have this as a principle, especially when problems or stalemates were encountered during the selection process itself. We usually display it prominently on a large banner in the front of the room, forming a constant visual reminder that we can refer to at any time during the self-selection process.

We do this because it is clear that whilst people have one decision to make—“which team should I join today?”—there are at least three levels on which they choose or prioritize. They could optimize for their own personal preference (I really want to work on the new iPhone app); they can optimize for the good of a team (this team really needs my skills more than the other team I would prefer to work in); or they can optimize for the organization (I can see the organization has a need over here which is critical to keeping the business running so I'm going to select to be over here).

Here we step into a crucial point around self-selection: a potentially hidden assumption that you might run into too. Self-selection is not about everyone doing whatever they like. We don't believe that is a recipe for a successful company. Instead, self-selection is about solving problems together; it is about compromises and trade-offs—with the key differentiating behavior being that the people involved in that compromise and who will feel the consequences actually make the decision. It is not done *to* them. Your self-selection is very unlikely to end with every single person sitting where they *want* to be; instead, it should end with every single person sitting where

they *need* to be and been fully involved in the decision making, trade-offs and ultimate placement.

The reason for our banner, “Do what is best for your company” is to imply that without this level of abstraction and thinking, we might not have teams to select into unless we position ourselves and our teams in a way that is beneficial for overall company. The visual reminder should help let people see that too.