Retrospectives Are Healthy

by Richard “Dick” Carlson

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Introduction

Retrospectives have been around for a very long time. I wouldn't be surprised if Neanderthals held them to improve on their hunting skills; and that's probably why we use them today. Not to improve our hunting skills, but to optimize what has worked well and share that knowledge with others. We also use retrospectives to identify opportunities for improvement and those things that prevent us from being fully productive.

The Purpose of Retrospectives

The purposes of retrospectives are to:

- Determine what was successful and what could be improved
- Discover, share and pass along the learning experiences
- Offer suggestions for improving the next iteration
- Share successes and improvements with others, and
- Build team commitment

The Sprint Retrospective meeting is time-boxed to three hours. The reason for time-boxing this important team meeting is to capture fresh thoughts, ideas, and memories of the sprint that just completed; good, bad, or otherwise. This does not mean you must spend the entire three hours in the meeting. Instead, take the team out for lunch at their favorite restaurant after their sprint review to decompress and have some fun. I like to ask the usual retrospective questions, but much more informally. For example, if we go out to a restaurant where there are a lot of people, it may be noisy and not very conducive to conducting a meeting. If this becomes challenging, make plans ahead of the retrospective to instead meet at a more private place such as a rarely used conference or meeting room that is located away from the work site and coworkers, has ample whiteboards, and that is convenient to the team. Insights are gathered easily in a low-pressure environment. Have lunch catered and observe the smiles on everyone's face.

Depending on the size of your team, the retrospective part of the meeting could take an hour or so, but this also depends on how the discussions are guided. With teams of 5 to 10 people, I looked for an appropriate time during the luncheon and then engaged the team in the retrospective by providing each team member with three standard 8.5" X 11" sheets of paper that were labeled: "What went well during the sprint?"; "What could have been better during the sprint?"; and "What needs to improve before the next sprint?" As we broached each point of the retrospective, I asked the team to write down all that they could recall from the sprint. If the restaurant environment works out, then tablets are preferable because Post It Notes do not work well in a restaurant environment.

Conducting Retrospectives

Holding a retrospective should be easy and fun. After all, we are trying to find those nuggets of good things we experienced and continue doing them and sharing them with others. We want to identify ways to improve before continuing. That is, identify things that could have been better and identify ways to improve, or simply avoid things that did not add any value to the overall work effort.

Sometimes retrospectives are no longer held because, "We've run out of things to improve" or "They're boring and nothing ever happens," then we need to determine why. Retrospectives should never be used to place personal blame or attacks on people. They should never become a meeting for planning or resolving issues. Retrospectives typically are held at the end of a sprint after all completed work was demonstrated and accepted. Something as significant as this should be celebrated in an uplifting environment. Adding hot pizza and cold soft drinks always makes people smile and relax.

So, who should attend a retrospective? For Agile or Scrum projects, the entire Team and the Scrum Master must attend. The Product Owner should attend if he or she is a good contributor and does not intimidate. However, if you are not part of an Agile or Scrum project team, talk to your project lead or project manager to discuss the benefits and values of holding retrospectives. Once approved, be sure that every team member attends and participates, and then ask someone to facilitate to make sure things keep moving to avoid wasting time. A manager could attend provided he or she contributes and doesn't mind hearing the truth. He or she could make things happen. A potential drawback for managers attending a retrospective is a fear of reprisal. Some managers just don't like hearing the truth.

It is recommended that a retrospective's environment include a whiteboard or a flipchart. Keep everything simple, relaxed, and informal. Provide some Post It Notes and Sharpies, and meet in a room free from interruptions. Tell everyone to attend without laptops, and have them mute or turn off their cell phones and pagers. Keep the meeting as short as possible – no more than 1 to 2 hours.

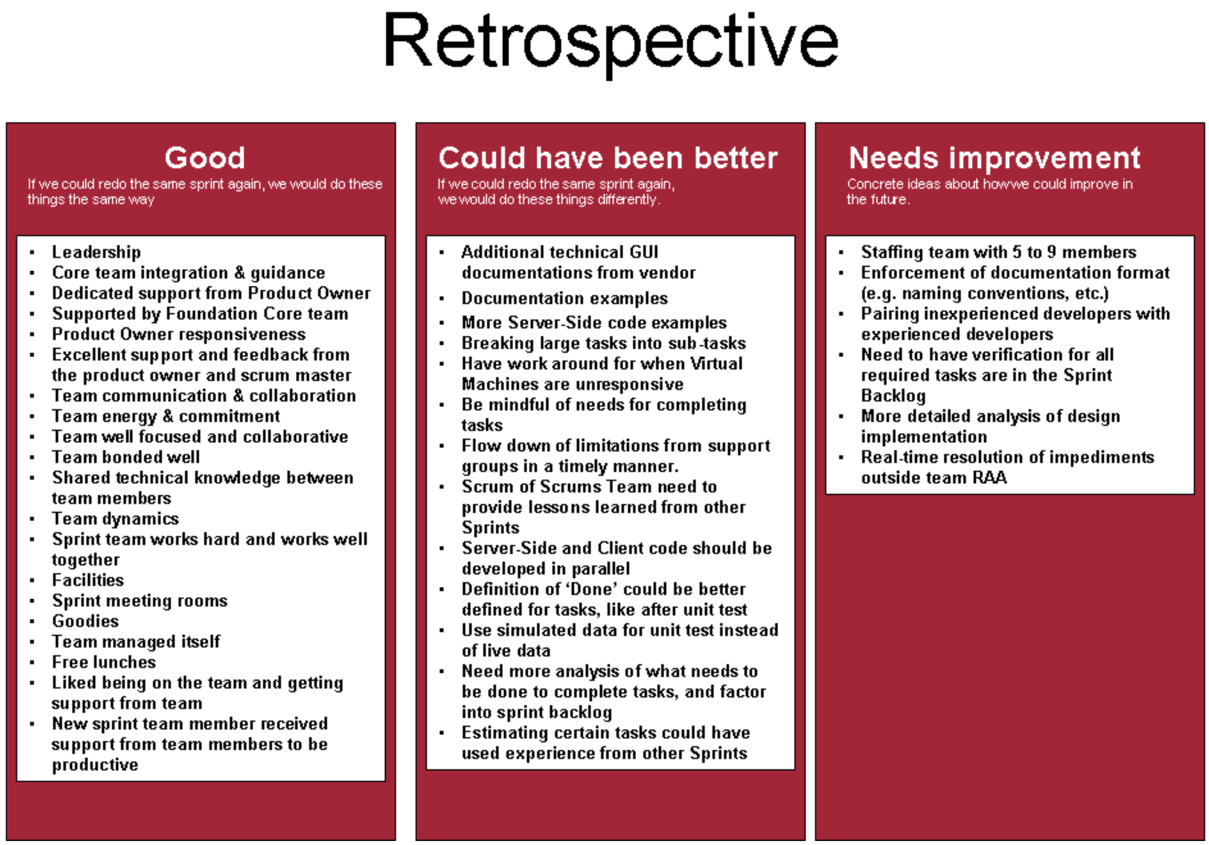
During the retrospective, establish a location where all feedback will be placed, and make it very clear that each person will have an opportunity to respond to the following questions:

- What went well?
- What could have been better?
- What must be improved before continuing?

Ask one question at a time to allow everyone to write down his or her response on a Post It Note (one for each response). When everyone on the team has finished providing feedback on that question, ask the next question. Repeat until all questions have been asked; all feedback has been written on Post It Notes, and the notes are placed in the appropriate retrospective column. Regarding feedback that identifies a continuing problem or impediment, ask the team to express the situation in user story format and encourage a volunteer to take action through resolution.

All items identified for improvement should be prioritized by the team. Action plans should be identified with volunteers taking appropriate actions to implement. Anything that exceeds the authority or scope of responsibility of the team should be escalated to management for action and implementation.

What if your team is distributed or otherwise not available to meet face to face? Simply schedule a meeting with the team via email and use a simple tool such as PowerPoint to record the team's feedback. Instead of Post It Notes, have each team member send responses to each category using Instant Messaging, WebEx, or similar means. Prepare a simple method of capturing the retrospective's feedback. Distributed teams I coached for years used PowerPoint successfully as a simple tool to capture such feedback (see example below). Then the Scrum Master can copy and paste each response into the retrospective's chart for posterity.



Critical Retrospective Steps

By applying a few simple steps, you can make retrospectives do wonders for teams, teammates, projects, and the greater organization. For example, throughout an activity lifecycle (project or day-to-day activities), we could benefit almost immediately from some of our own feedback. Here are a few examples of things that went well:

- A clear understanding of the project's vision
- The task board updated in real time by team members
- Everyone showing up on time at daily standup meetings
- A good mixture of experienced and skilled team members
- The project's roadmap and approved release plan were in place prior to startup
- Assuring all necessary and requisite infrastructure was established and in place prior to start

A Few Ground Rules

- The meeting is attended only by the team, Scrum Master, and Product Owner.
  - Product Owner attendance is recommended, providing he or she is willing to actively participate without intruding, does not intimidate, is not overbearing, and is available.

- After the retrospective, the Scrum Master gathers the team's responses in a simple format using Excel or Word and shares all responses with other teams and the greater organization.
- The team prioritizes the order it wants potential improvements to be implemented.
- The Scrum Master does not provide answers during the meeting, but facilitates the team's search for improvement opportunities to the Scrum process.
- Items identified as actions that can be added to the next sprint should be recorded in a parking lot.
  - A parking lot can consist of a simple area of white board or a sheet of plotter or similar paper where such actions can be viewed openly by all.
  - Parking lot items should include actions to be taken, the person(s) who volunteered to implement the action, and when implementation is due.

When Retrospectives Go Awry

There are many reasons why sprint retrospectives fail or are not effective. In many years of coaching and facilitating Agile and Scrum project teams, I have found the following reasons to be the most adverse:

- Team members fail to show up
- Feedback from team has no value
- The Retrospective becomes mundane
- The Retrospective is rushed or not held
- The Retrospective's ground rules are ignored
- The Retrospective is taken over by management
- Management sees little or no value to a retrospective
- Action items and plans are not recorded or acted upon
- The Retrospective is conducted in a hostile environment

Conclusion

In conclusion, retrospectives held at the end of each sprint prevent small problems from becoming big problems and big problems from becoming catastrophes. Retrospectives help teams fine-tune their productivity at a sustainable pace. At the beginning of a new project, the decision to conduct retrospectives must be made very clear to all required participants to ensure maximum participation and commitment. Include a reminder that the feedback should not be deferred until the meeting, but captured as they present themselves to avoid forgetting or otherwise missing out capturing valuable feedback. If an improvement or corrective action is to be implemented, the responsible individual or group must be able to allocate sufficient time to execute what they agree to do.

References

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The Retrospective Handbook: A guide for agile teams; Mr. Patrick Kua; ISBN 1480247871; 2013

About the Author

Dick Carlson has an extensive engineering background that includes many years of practical knowledge and hands-on experience in the implementation and deployment of Agile, Lean, and Scrum values and principles in communications-electronics engineering, software engineering, and systems engineering within the aerospace, DoD, IT, and industry domains. He has developed and actively conducted comprehensive training courses for Scrum Teams, Scrum Masters, Product Owners, project/program managers, customers, executives, organizational leaders, and others interested in learning how to implement and deploy Agile, Lean, and Scrum.

Recently retired from Boeing, Dick has been an active transformational leader for many small and large Agile projects, and frequently shares his experiences of successful Agile implementation at conferences, workshops and symposia. He regularly counsels executives and leaders on the benefits of using Agile, actively coach's teams on Scrum and Lean-Agile Project Management fundamentals, and then follows up with mentoring activities to ensure successful project implementation.

Mr. Carlson has a Bachelor of Science degree from the University of Maryland, and is a Certified Scrum Professional, Certified Scrum Master, and Certified Scrum Product Owner, and holds a Lean-Agile Project Management certification. Mr. Carlson has presented Agile topics at Software Technology Conferences every year since 2010.