



## Creating Champion Scrum Teams

*Organizational Development and ScrumMasters  
Unite to Outfit Teams with All New Tools for Success*

By

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## Overview

The subject company (ALLDATA) was planning its first entry into the European market, with the next generation of a data-driven automotive repair product developed in the US and Mexico. The goal was particularly ambitious for the company because it was fundamentally different than what it had done in the past. The timeline was tight and the three teams required for this task (Data, Web Services, and User Interface) would have to do better at achieving key milestones than they had ever done. Many of the team members had worked together on other projects. This paper addresses the story of the data team and their cycle of continuous improvement.

Half of the data team worked together previously on another data/backend services project with limited successful results. The other half of the data team came from positions outside of technology from a department where their day-to-day work was predefined and highly specialized. To compound matters, they did not have experience being on a Scrum team and, in fact, had only a general introduction to Scrum due to the company-wide training offered in 2010 and 2011. Each of these team members were data specialists in their own department and as such became the data team's subject matter experts (SME).

Early on the data team recalled the challenges they had faced during their previous data project. They quickly recognized that with the importance of moving into the European market, they would have to find a way to be more successful than ever before. The data team recognized that the business pressures they were facing required a leap in performance and increased levels of personal accountability in order to evolve the unknowns of the project. As a result, they made a conscious decision to completely overhaul their approach by integrating new knowledge and a combination of modified Scrum and Organizational Development exercises that developed team skills, which allowed them to achieve higher levels of effectiveness and efficiency. The team worked on a number of strategies that allowed them to perform their work faster and better. The six strategies featured in this article are:

1. A commitment to accountability
2. Describing a future vision
3. Clarifying team roles and responsibilities

4. Risk planning
5. Understanding collaborative strengths & weaknesses at both an individual and team level
6. Continuous improvement

In total, the team devoted only 14 hours to this work over time (excludes prep time by the ScrumMaster). The result: it made a huge difference in their ability to accomplish the goal set before them. The data team is now much more effective during iterations. The quality of their work improvements is visible by the significant reduction of defects and higher percentage of stories completed during the test period (six months to beta delivery), monitored by internal team metrics (new data team to previous data team). The team is now famed for delivering *on time* and *under budget*, even through significant challenges. The team has now created a very different type of experience in the organization: moving into a position of being known as the team that is now a model of success. Many people in the organization now celebrate this team's success.

This article describes each of the six elements and what the team did in each area. A separate Playbook describes the specific exercises completed at each step.

## **1. A Commitment to Accountability**

All Scrum teams in the company were required to have a Team Agreements artifact that defined how the team would do its work. As a starting point for creating its own artifact, the data team reviewed previous teams' agreements. In doing so, the team discovered the example artifacts from other teams were, in truth, little more than working agreements. The data team concluded that the previous agreements had not been given serious consideration in the past. None of the prior examples were specific enough to provide useful guidance or reflect commitments to excellent teamwork given the many new things that had to be accomplished in an accelerated timeline.

The data team's Solutions Architect (SA) introduced the team to the Oz Principle of accountability<sup>1</sup>: where people are encouraged to overcome the tendency to blame others when things go wrong, and instead accept responsibility and identify ways that they can personally contribute to achieving a better outcome. With their ScrumMaster guiding the team to write Working Agreements (rather than Team Agreements), the SA challenged the team to write agreements that embodied the principles of accountability. In the next 10 minutes, the team identified 17 Working Agreements that operated as "ground rules" the team adopted to ensure successful performance (see list, below).

#### **Working Agreements**

- We demonstrate "Above the Line" behavior [*taking responsibility rather than blaming others*]. We See it®, Own it®, Solve it®, and Do it® (SOSD)
- We learn from our successes and failures. We identify successes/failures as soon as they are visible, and identify what we can learn from them. We document our successes and our failures.
- We offer feedback to team members, and we act on feedback we receive from others. Feedback is defined as an open dialogue about anything project related directed to the betterment of the team. Feedback includes topics such as technical decisions, business decisions, and SOSD items. Feedback is not taken personally. We do not retaliate.
- We take necessary risks; we do what we say.
- We take accountability, ownership, and do not blame others.
- We reach out to our team members to help each other, and this Team, succeed.
- We ask others for help if we are struggling with something.
- We appreciate and utilize our strengths and differences.
- All meetings have a specific agenda, an expected outcome, and are time boxed.
- We have one conversation at a time during meetings.
- We utilize parking lot and yellow cards for off topic conversations.
- Artifacts: we create file name(s) with a YMD for ease of sorting.

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<sup>1</sup> *The Oz Principles: Getting Results Through Individual and Organizational Accountability*, Rev May 2004

- We are on time for meetings and send status via email (send to the Team alias) when we cannot make it to meetings.
- We are transparent in our communication; always cc'g the Team alias on any email regarding Team work. We do not work in silos.
- We stay focused and engaged during our Team meetings. We do not check our email, or answer our phones.
- We have a script for demo, with a list of who is demoing each story on the script. We pick someone to prepare the script for each sprint.
- We present our Team as unified, and aligned. Team decisions are supported by Team members unanimously.
- EULA Clause: Team Agreements can be amended at any time; however, the Team must agree on the change(s).

***How accountability has helped the team:*** The data team now operates from a view point of accountability, both individually and collectively. The Working Agreements artifact improved collaboration by prompting team members to treat one another with mutual respect and help each other when needed (rather than letting a team member flounder). For example, one team member had volunteered to perform a set of critical tasks. Just before the deadline the team realized that person lacked the depth of knowledge to complete the job. Instead of blaming the volunteer, the team members agreed that it was the team's fault for not investigating whether the team member was the right person, with the right skills, at the right time (one of the company's six cultural beliefs, which were developed in an Oz workshop). The team pulled together and worked some very long hours to solve the problem; they recognized that collectively they were the right people, with the right skills, just in time. Moreover, they committed to each other to make sure team members that volunteer are the right choice for the task at hand.

## **2. Creating the Future**

The next step the team took was to discuss the vision for the product. In the first session, the Product Owner shared his vision with the team and fielded questions from them. The document went on to address what value he wanted the team to provide in the future for the company's customers, its business objectives, and the constraints that had to be overcome. The original

draft included such things as the feature set, reducing costs and phone calls, keeping the product up-to-date, an outline of what selling points the company had at the time, and the challenges the company faced.

In a second session, the team worked together to create a condensed statement of how they saw themselves matching and meeting the product vision. They used an adapted version of an exercise called “Walk the Wall” (see the Playbook for details). The team was reminded of their goals and Working Agreements, and each member wrote down their understanding of the project vision on their own. They each shared their version with the others, then the team as a whole discussed the options to come up with a common statement.

The team landed on this vision statement:

*We commit to helping business product owners deliver the integrity and features of the OEM source material in Europe without sacrificing the value (the subject company) provides. We commit to doing this by supporting:*

- Easy content findability*
- Broad, nearly complete content coverage for selected vehicles*
- Reliable, flexible updates*
- Content delivered in the manufacturer’s format (OEM Taxonomy)*

The team also discussed their Future State, asking themselves, “How will we know when we have been successful?” They arrived at the following Future Success Statement:

*We are a team that delivers the technology to dynamically publish data.*

***How a vision statement helped the team:*** As this team discovered, having a vision statement improved both commitment and accountability. The Future Success Statement inspired and propelled the team to keep going; it provided an emotional energy whenever they met barriers. Having a clear vision helped the team take more control over its future. The vision statement also gave the team a reference point it could use to gauge progress and to validate if they were still on the same path, or adjust their work (or the vision) as needed.

### 3. Managing Boundaries (Roles and Responsibilities Exercise)

In the subject company, teams did not formally identify roles and responsibilities in a detailed manner. For some teams, roles and responsibilities were listed in the confines of a Charter document but the section was very light in terms of detail and often not visible to the teams as the commitment was created in a silo. The team decided to change the experience from stepping on one another's toes or, more often, overlooking tasks, often citing that they 'thought someone else was going to do that' to a firm personal and team commitment. To accomplish this, each team member completed a list of their responsibilities on the team—the tasks or jobs they performed. The lists were emailed to the ScrumMaster. The whole team reviewed and discussed the lists at the next team meeting.

When the lists of responsibilities were considered complete, the team played a game of what-if for each team member: *What if this person wins the lottery and leaves the company? Who will fulfill their responsibilities?* The exercise was continued until the team identified all the people who could backfill each responsibility for each role. The final result; a firm team agreement, a poster for each person's role listing their responsibilities and who would fulfill them if need be, was posted in the team's dedicated war room.



***How clear roles and responsibilities helped the team:*** This exercise helped the team realize that there were a number of single points of failure—critical skills that would be lost if a person left the team for any reason, thereby crippling the team's progress and ability to fulfill their commitment to the project. In most cases, the team identified other people in the company who could perform the task, but there was one team member who was the *only person in the*

*whole company* who knew how to conduct load testing for all of the products. The team took steps to seek cross-training of additional people for this critical skill.

Another key insight from this exercise was the company's project managers played vital roles in ensuring success. Since the company's migration from Waterfall to Agile Scrum, the project manager role was in fact one of the roles that had not clearly been resolved. However, as the data team discussed how to backfill the project manager role, they became aware of just how much critical work is done by that role – and only that role. As a result, the role of project manager is better-defined today.

The data team became much more proactive in working with vendors and clarifying what third parties will and will not do. Members quickly identified gaps in responsibilities, and took action to fill them.

The data team realized the importance of clarifying who does what and each person's responsibility commitments to achieving the team's vision and key goals. Because responsibilities became much clearer, tasks seldom fell through the cracks, nor efforts duplicated. Posting each person's list in the team war room helped remind the team of the work they had done together, the commitment they had made to one another, and the importance of accountability.

In the spirit of continual improvement, each time a new team member joined, the team completed a roles and responsibilities list for that member. The value of taking 20 minutes to create a roles and responsibilities list for a new team member is a value this team is not willing to forego. The new team members have commented that it has been helpful for them to know what is expected in their new team setting.

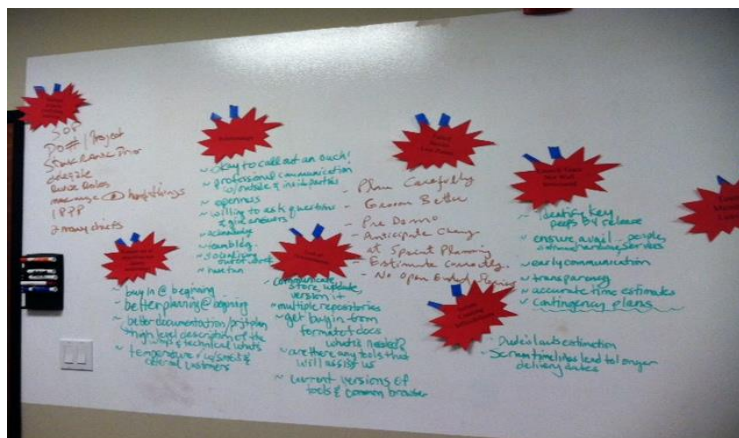
#### **4. Risk planning (The “Landmine” Exercise)**

A key to any team's success is to identify potential risks and then develop a list of mitigations to resolve each risk should any of them become a reality. Too many times, teams do not take the time to talk openly about the risks until it's too late.



The Landmine exercise (see Playbook for details) introduced a way for the team to identify risks that could prevent success, and to develop plans to reduce, eliminate, or at least react swiftly to each risk. In this exercise, the team reviewed a list of problems that had occurred in previous projects throughout the company, including typical problems such as Scrum creating inflexibility, lack of clear definition of the desired product features, challenges in working with third-party vendors, disengaged team member, and unclear communication between team members.

Each problem or risk was posted up on a wall, written on an “explosion-shaped” piece of paper and addressed one-by-one. The team was given 30 seconds to come up with ways to address the risk.



If the landmine was deactivated—meaning the team came up with ways to avoid or fully compensate for the risk—it was moved to the “Wall of Safety” located across the room.



At the end of the exercise, the ScrumMaster documented the actions that had allowed some risks to be moved to the Wall of Safety as well as ways to respond to risks that could not be fully eliminated.

***How risk planning helped the team:*** Completing the Landmine exercise gave the team a real sense of accomplishment when they realized they had already succeeded in readying themselves for 25% of the risks identified. Through inclusion in sprint planning, the team was able to work on mitigating risk for the remaining landmines.

## 5. Understanding Collaborative Strengths & Weaknesses

One of the biggest challenges that teams face is their uncertainty about how best to assign different types of work. This challenge ranges from specialized tasks required for different projects to the types of tasks that all teams have to do (tracking progress, organizing assignments, developing ideas). To address this challenge, each team member was given a Belbin Assessment (see [www.3CirclePartners.com](http://www.3CirclePartners.com) for greater explanation of the Belbin).

Following that assessment, the team brought in 3Circle Partners to guide them through a rediscovery session (see Playbook for explanation of the value, but contact 3CirclePartners for details). This session helps teams fill gaps in their purpose and understanding of and commitment to team deliverables. Part of that process is to identify the team's collective strengths (Team Roles) and strategies to help the team function at peak levels (Team Mapping). There are nine roles, which fall into three main categories that can be further defined by 3Circle Partners:

- **Thinking:** skills that help a team logically evaluate a situation (including creative and analytic skills).
- **Action:** skills needed for a team to get anything done (such as planning and organizing).
- **People:** skills that help a team work collaboratively both within the team and with the rest of their organization (such as staying connected with each other, coordinating their tasks). (See CHART 1)

Participant Name	Thinking			Action			People		
	PL	SP	ME	SH	IM	CF	CO	TW	RI
Team Member 1		2	3	9	7		1		8
Team Member 2	7	1		2	8	3	9		
Team Member 3	2	1	3	9				7	8
Team Member 4	9	1	3	7		2			8
Team Member 5		9	7	2	8			3	1
Team Member 6	3	8		9	2	1			7
Team Member 7	1	2	3	7			8		9
Team Member 8		1	2		9	7	3		8
Team Member 9	7			2	1	3	9	8	
Team Member 10	3	2		9		1	7		8
Team Member 11	1		3	9	8		2		7
Category Count	5	7	6	3	2	5	3	1	1
		18			10			5	

CHART 1

Chart 1 represents the data team's Belbin Team Role Map. Analysis of their Team Role Map led to many insights, this paper shares the top three key insights:

**Insight 1: The Team had an overabundance of "Thinking" skills.** A common consequence of having many strong thinkers is that the team can be easily distracted by ideas, and experience trouble focusing their effort. Because the team included many types of specialists (SP) that problem was relatively minor.

**Insight 2: The team was weak in the "People" skills.** Team members who had worked together before recalled that the old climate was one where people did not listen to each other, and there were many times when they had spoken sharply to each other. They came to realize that a lot of problems had stemmed from their lack of attention to what was going on with team members personally, which hindered their ability to communicate effectively. To solve this problem, the team members with higher marks in the people category had to be extra vigilant in speaking up if they thought the team was missing an important dynamic and in helping the team deal with issues head on. The team encouraged members without higher marks in the People category to step outside their comfort zone in an effort to improve communication.

**Insight 3: The Project Manager was the most action-oriented of the team members.** One team member (team member #9) had lower marks in the People category. This became apparent during a particular release schedule when she was viewed as abrasive and demanding by those outside the team who had not benefited from an inside view into, and understanding, of her

Belbin. The team understood she was simply focused on getting work done and meeting deadlines. However, for the people on her core team (the data team) who came to appreciate her Belbin in all its glory, she was heralded-even applauded-for being bold enough to get the tough things done in a timely manner. The data team realized that without this action focus, they would be challenged to get things done on time.

Though aware of its limitations, the team still retains a strong bias towards Thinking & Action. With the People category so low, the team has needed to remember to look at the implications regarding their goals, their new approach, and to listen to one another.

***How an understanding of collaborative skills helped the team:*** Having a better understanding of each member's collaborative strengths and weaknesses has helped nearly every aspect of the team's work. They have begun using that information to help them assign tasks, improve communication, hold useful discussions, and so on. Most importantly, the team used this newfound knowledge to craft their Team Agreements artifact.

Previously in the paper, we discussed the team member that volunteered for a task for which he was not best suited. Because of the work the team did with 3Circle Partners, they learned to analyze the situation and instead of crucifying the team member, they were able to recognize that he had volunteered because he is a team worker. Then came the realization they had done him a disservice in not reviewing his Belbin map and came up with this most recent Team Agreement: "When deciding on what team member should do what, we commit to review our Belbin map to determine which team member is the right person for the job according to his/her Belbin." This is just one example of the team using their strengths to their advantage.

## **6. Continuous Improvement**

To help work on the team's commitment to continual improvement, the data team periodically measured their performance using a Team Performance Index (also from 3Circle Partners), in which they scored themselves individually and as a team on six dimensions of effectiveness (goal setting & alignment, planning, assigning responsibilities, use of data, conflict/decision making, and learning). This was done on three separate occasions to gauge growth.

The charts on the following pages show how the data team progressed and became more cohesive in many of the sections as they worked together on the six dimensions, even though they added new team members. It is important to note that the addition of new team members contributed to a change in the percentages. (See CHART 2 through CHART 7)

CHART 2

<u><i>Goal Setting &amp; Alignment</i></u>	Results from TA1	Results from TA2	Results from TA3	Improvement from TA1 to TA2	Improvement from TA2 to TA3	Overall Improvement from TA2 to TA3
	% of people on the team in agreement with the statement					
Is there an explicit discussion of goals involving the whole team?	80%	73%	75%	-7%	2%	-5%
Is there individual agreement and commitment to these team goals?	100%	100%	83%	0%	-17%	-17%
Are the goals quantifiable/measurable?	60%	73%	100%	13%	27%	40%
Are targets that were agreed upon realistic?	70%	64%	83%	-6%	20%	13%
Are goals recorded and displayed so that they are clear and visible to all?	50%	55%	83%	5%	29%	33%

With regard to Goal Setting & Alignment, the team improved by an average of 13%.

CHART 3

<u><i>Planning Team Processes</i></u>	Results from TA1	Results from TA2	Results from TA3	Improvement from TA1 to TA2	Improvement from TA2 to TA3	Overall Improvement from TA2 to TA3
	% of people on the team in agreement with the statement					
Is there an agenda for the meeting?	60%	91%	75%	31%	-16%	15%
Is there an explicit discussion of the process to be used to make decisions?	50%	45%	42%	-5%	-4%	-8%
Is time allocated effectively? Do meetings start and stop on time?	70%	73%	100%	3%	27%	30%
Is there a contingency plan in place for each of the above items?	0.20	18%	67%	-2%	48%	47%
Are the agenda, process, and timing documented and visible to all team members during the meeting?	0.20	55%	67%	35%	12%	47%

With regard to Planning Team Processes, the team improved by an average of 26%.

CHART 4

<u><i>Assigning Responsibility</i></u>	Results from TA1	Results from TA2	Results from TA3	Improvement from TA1 to TA2	Improvement from TA2 to TA3	Overall Improvement from TA2 to TA3
	% of people on the team in agreement with the statement					
Are individual roles aligned to the team goal and process to be used?	100%	100%	100%	0%	0%	0%
Are responsibilities assigned to team members to take advantage of their strengths?	80%	82%	92%	2%	10%	12%
Does every member of the team have an assigned responsibility?	100%	91%	92%	-9%	1%	-8%
Were all of the tasks and responsibilities assigned to individuals performed effectively by those individuals?	80%	82%	92%	2%	10%	12%
If responsibility assignments changed during the meeting or activity, is there an explicit handoff, and is it understood by everyone on the team?	30%	27%	67%	-3%	39%	37%

With regard to Assigning Responsibility, the team improved by an average of 10%.

CHART 5

<u><i>Discovery of Data</i></u>	Results from TA1	Results from TA2	Results from TA3	Improvement from TA1 to TA2	Improvement from TA2 to TA3	Overall Improvement from TA2 to TA3
	% of people on the team in agreement with the statement					
Is participation fairly equal across all members of the team?	60%	64%	75%	4%	11%	15%
Do people provide reasoning and/or data behind their opinions?	80%	100%	100%	20%	0%	20%
Do people use inquiry to gain further understanding about others' views?	70%	91%	100%	21%	9%	30%
Are the minority opinions explored and discussed on an equal footing with other ideas?	80%	91%	92%	11%	1%	12%
Are the assumptions identified and exposed to public testing?	50%	73%	75%	23%	2%	25%

With regard to Discovery of Data, the team improved by an average of 20%.

CHART 6

<u><i>Handling Conflict &amp; Making Decisions</i></u>	Results from TA1	Results from TA2	Results from TA3	Improvement from TA1 to TA2	Improvement from TA2 to TA3	Overall Improvement from TA2 to TA3
	% of people on the team in agreement with the statement					
Do individuals openly and spontaneously bring up differences of opinion?	100%	100%	100%	0%	0%	0%
Is conflict used constructively to reach better decisions?	60%	100%	100%	40%	0%	40%
Are conflicts being resolved, rather than avoided and/or suppressed?	80%	91%	100%	11%	9%	20%
Is everyone in the team involved in the decision-making process or, at least, fully committed to the decision made?	80%	91%	92%	11%	1%	12%
Is the final decision made based on firm conviction, rather than compromise?	30%	73%	83%	43%	11%	53%

With regard to Handling Conflict & Making Decisions, the team improved by an average of 25%.

CHART 7

<u>Learning &amp; Feedback</u>	Results from TA1	Results from TA2	Results from TA3	Improvement from TA1 to TA2	Improvement from TA2 to TA3	Overall Improvement from TA2 to TA3
	% of people on the team in agreement with the statement					
Does the team employ periodic or concurrent checkpoints within the meeting?	50%	91%	67%	41%	-24%	17%
Is time set aside for "post" checks at the end of every meeting or activity?	30%	27%	58%	-3%	31%	28%
Are the corrective actions from previous analyses being put into practice?	40%	82%	75%	42%	-7%	35%
Is the team honest when assessing its performance in relationship to the goals it set for itself?	90%	91%	100%	1%	9%	10%

In the category of Learning & Feedback, the team improved by an average of 23%.

**How a focus on continual improvement helped the team:** At first, team members looked at the Team Performance Index as “busy work” however they soon learned that the measurements gave them a starting point for productive discussions on how to operate effectively, both individually and as a team.

## Changing Culture (and Results), One Team at a Time

In the beginning, the team members were uncomfortable with the exercises that led them into unfamiliar territory. Throughout the six sprints that the team worked on using these new approaches, trust ebbed and flowed. But as they began to see major improvements in their work-product, they embraced the changes and developed an amazing sense of teamwork. Even when the challenges seemed insurmountable, the team remained steadfast and clung to its commitments. As the team began to achieve what the company had defined as success (fewer defects caused by coding, less technical debt and a more cohesive and accountable team) members found that their review meetings with senior leadership were no longer preceded by fear, but

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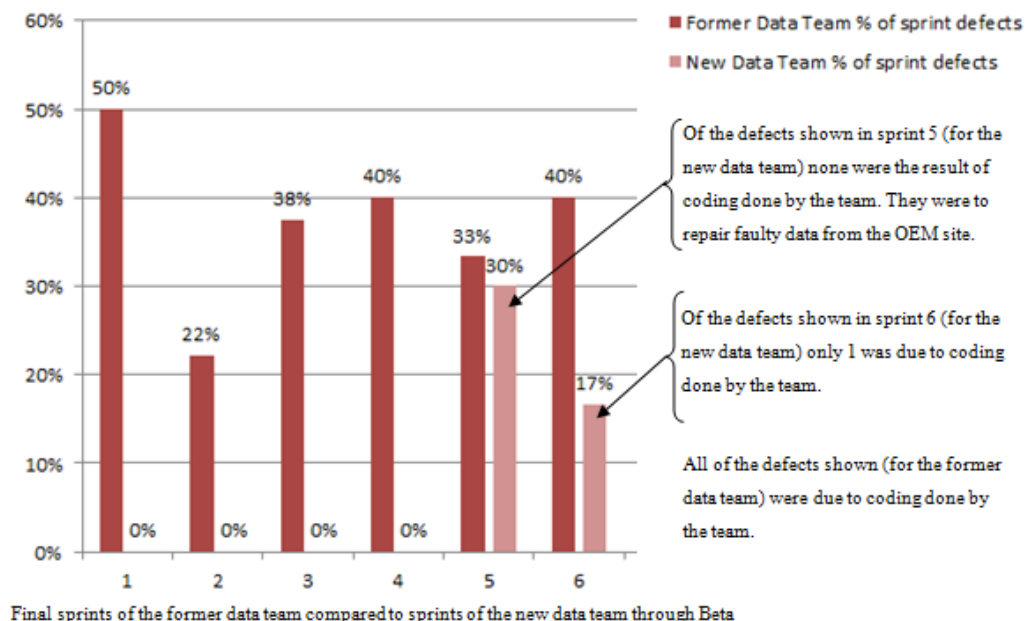


CHART 8

confidence that they had done the right things, and done them well. At the start of this experiment, the team was asked to quickly give their best thinking and performance during an emergent culture of accountability and agility in response to change and challenge. They remained focused on the idea that leadership is a collective effort. In practicing personal and team accountability, members found they worked more efficiently, thereby reducing the number of defects per sprint as seen in CHART 8.



## Closing

The team took charge and created new experiences for themselves and for the company. It responded to and embraced the modified Scrum exercises and artifacts, along with exercises that were embedded in Organizational Development strategies (see the accompanying Playbook). The team focused their efforts against a backdrop of personal and team accountability. Team members incorporated the principles of accountability and invested in a time of rediscovery, with agility and commitment. It was who they had become. It is who they are. It is who they will be on future teams as they take with them their new culture.