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Planning for Effective Agile Retrospectives

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October 5, 2009

Agile retrospectives--the process of inspecting what has happened during a particular timeframe and creating action plans for improvement--is a critical success factor in any iterative and incremental set of practices. The 12th principle supporting the Agile Manifesto states: “At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.” In Scrum, an agile project management framework, retrospectives are considered one of the basic practices that must be followed. Retrospectives are at the core of the “process-centric” feedback loop built into the Scrum framework.

In order to get that incremental improvement, your retrospectives must be valuable and effective. A valuable retrospective is much more than sitting around a table discussing the pluses and deltas of what happened in a sprint. In order to ensure that the time in a retrospective is well spent, I understand that I must invest my own time in planning for that meeting--and that the time spent planning is often a key factor in the success of the outcome. When I’m planning a retrospective, I know that I need to take the time to consider who to invite, what room to use, which activities to choose and what materials I need to create before I ever walk in to meet with the team.

Have the Right People Participate

A critical input to having an effective retrospective is that the right people are participating. For a sprint retrospective, this means that the team members are present and participating. For a retrospective covering a longer period of time--perhaps a release or an end-of-project retrospective--then there are generally more players involved.

A question that I am often asked is whether the product owner (or in XP terms, the customer) should be present for the retrospective. In my opinion, that depends on the relationship between the product owner and the team. The very best retrospectives that I have attended (or facilitated) had everyone with skin in the game participating (and thus included the product owner). If, however, the team is operating in a low-trust environment, then they may decide to not include the product owner in their sprint retrospectives. I do not make this decision unilaterally; I ask the team what they want to do.

At certain times, I have actually held two retrospectives: one with the entire team, including the product owner; and another that was shorter with more informal retrospective for just the delivery team, where we felt more comfortable discussing our “dirty laundry” and working to resolve issues within the team. This isn’t a solution that I generally recommend, but it met our needs at the time.

> Distributed retrospectives, with team members in different geographical locations, are more difficult and generally less effective than co-located retrospectives -- but do-able. If I have to choose between having a distributed retrospective or no retrospective, I will go for the distributed retrospective. This entails some different planning perspectives and concerns than for co-located retrospectives.

I also do not recommend that functional managers or other managers attend the team retrospectives, even as simple observers. I can’t stress enough the need to establish trust within the team and in the retrospective itself with open, honest communication. Having observers inhibits that trust, and in nearly every case impacts the team and their responses. My advice? Just don’t do it.

Allocate Enough Time

When planning your retrospective, make sure to allocate enough time to hold an effective retrospective. There are a number of factors to consider here. For example, if you have an experienced team that is familiar with each other and the agile processes and practices you are using, you can plan for less time for the retrospective. If your team is new to each other and/or new to the agile practices they are using, plan for a longer time to inspect what happened during the sprint and to create a plan for that incremental improvement. Team members are climbing up a learning curve and will need more time to digest everything.

I generally plan for a minimum of 90 minutes for a well-gelled, average-sized team with low or medium emotional intensity involved in a two-week sprint. My time allocations generally move up from there. (Also remember when you are planning the length of your retrospective to include time for short breaks.)

Some of the variables that I consider when I am planning on how much time to reserve for a retrospective include:

- The number of people participating in the retrospective. With more people participating, plan for everything to take longer
- The comfort level of the team with each other and with the agile practices they are using. Again, assuming two-week sprints, if the team is new to each other or to the agile practices, I plan for 120-180 (or more) minutes for the first three or four sprints. There is just that much more to discuss when they are first implementing agile practices. After the first three or four sprints, I generally start reducing the time allocated.
- The emotional intensity of the sprint. If the sprint has had high emotional intensity, then I allow extra time. This allows people to vent and get things said, and gives us time to dig deeper into root causes and come up with effective action plans for improvement.
- Length of the sprint we are retrospecting. Longer sprints (three or four weeks) have more events and issues to review. Release and project retrospectives need even more time and generally have more people involved. For a longer release cycle, say four months or more, a full day retrospective is not unusual.

Consider Room Size And Configuration
Appropriate space is another important factor to consider when planning your retrospective. A private room is essential. Establishing privacy, safety and trust is critical for a team to truly delve into issues and impediments. Trying to do this in a public space is difficult, if not impossible. The space must be the right size as well. A room that is too small impedes your ability to run effective exercises to meet your objectives. A room that is too big inhibits the interpersonal relationship building that is inherent in a good retrospective.

When planning where to hold your retrospective, consider the configuration of furniture and available wall space. Moveable desks are the best--you can configure the room to meet your needs. Large, long, immovable conference tables are usually the worst configuration you can have--and they are also the most common! People are forced to sit larger distances away from each other, with the table as a physical barrier to small group break-out sessions and other activities. Often you won't have the option to choose a space with appropriate furniture, but if you do, avoid those long conference tables if you can.

Enough wall space is another factor. Make sure you visually check the room size and layout before your retrospective to avoid unpleasant surprises. Plan on space to put up flip charts on the walls--both those charts that you've prepared for the retrospective and those you create during the retrospective itself. I've had to get creative after finding myself in a space with the walls covered with pictures (immovable, of course!) and building management decided that I couldn't use the windows to post flip charts. We did manage--by covering the pictures and walls with blank paper, and then using that as our canvas. Other times I have lowered the blinds and taped the flip charts we created to the blinds. You can get creative with this type of thing if you need to.

When reserving the room, make sure that you allocate enough time for you to go in and prepare the room before everyone else arrives. As facilitator, you should arrive early--with enough time to get all your materials in place and the furniture in the appropriate configuration.

Bring the Right Supplies
I've learned not to assume that everyone will bring what's needed for a retrospective meeting, even simple items like pen and paper. I have a check list that I use to make sure I've got everything in the room when the meeting starts. Basic items on my checklist include:

- Medium point Sharpie pens for each participant, including myself
- Post-it notes of various sizes
- Flip chart pens of various colors
- Flip chart paper and stand
- Painter's tape for posting the flip charts
- Colored dots for multi-voting or prioritizing
- Colored stickers with smiley and frowning faces
- Other materials as needed for the activities we'll be doing.
- Camera for pictures of charts and team activities

I also bring in and post the team's working agreements and definition of done that have been created previously, as resources.

Plan and Create Your Materials In Advance
It is important that you allow yourself enough time to plan and create your materials. I am a strong believer in big visible charts, especially for retrospectives. Before you walk into your retrospective, you should have the agenda prepared, neatly printed on flip chart paper. Even if you've sent the agenda out previously (as part of the meeting invitation, for example), you should have a chart with the agenda printed in a large, legible, easy-to-read format. Handing everyone a printout of the agenda is not the same thing. You will be referring to the agenda often as you move through the different parts of the retrospective. Everyone in the room needs to be able to see it. If you adapt the flow in response to what is happening in the room, you can make that change directly on the posted agenda for all to see.

Two other standard charts that I use for retrospectives (and many other meetings) are the Key Decisions and the Parking Lot charts. These are very simple--blank flip chart paper with the title (i.e. Key Decisions) and a border around the edge of the paper. As we go through the meeting and key decisions are made or items for later discussion come up, we'll capture them on Post-it notes and put them on the appropriate chart for later reference.

In addition, I always have my facilitation notes written out and available. These are notes just for me as facilitator, that outline the activities, the timing and flow, and other items that I need to keep in mind as we get into the discussions. Once I have put the notes together, I can start to prepare the necessary materials for the retrospective.

The other materials that I prepare in advance depend on the activities I have chosen to use during the retrospective. It is important that these materials are prepped and ready to go, so as to not interrupt the flow of the meeting. When deciding what activities to introduce to the group, I generally consider these types of variables:

- Sprint length
- Available time for the retrospective
- Team personalities and team morale
- What happened during the sprint – emotional levels
- Organizational culture or environment
- Relationship between the business and the delivery team

If I am coming in as an external facilitator (which is usually the case), I will have short preparation meetings with team leaders (both from the technical side and the business side) to get an idea of the sprint or release. The better understanding that I have of the team, the environment in which they are working, their familiarity with agile practices, and major events of the sprint or release, the better I can plan a good agenda for an effective retrospective.

Use a Structured Agenda
I use a basic structured flow for my retrospective agenda that I learned from Esther Derby and Diana Larsen in their book "Agile Retrospectives: Making Good Teams Great." This book is a great reference – full of different activities for different parts of a retrospective in various situations. I use it, and highly recommend it. I've amended the language that they suggest for a retrospective agenda slightly for my own use, however the basic structure remains the same.

When planning your agenda, choosing the right activities is extremely important. One important lesson that I learned is the need to "mix it up" with different discussions and activities within the basic structure. I have found that if the same activities are done every retrospective, they lose their power to draw out the important data or get to meaningful conclusions. For example, if every retrospective is simply going around the table asking "What went well in this sprint?" and "What could have gone better?", then in a few sprints the answers lose their impact.

Here's a sample agenda for a retrospective similar to one that I facilitated recently:

Set the Stage

- Welcome, review the agenda
- Discuss working agreements (discussion)
- Team appreciations based on the Scrum Values (activity)

Gather Data

- Review results from previous retrospective (discussion)
- Review Sprint results (discussion)
- Temperature Check (activity)
- Prioritize Items (activity)

Analyze the Data

- Small group brainstorming for root causes (activity)
- Debrief small group results (discussion)

Create the Action Plan

- Stop/Start/Continue (activity)
- Review The Plan (Who will do what, by when?)

Review the Retrospective

- Pluses and Delta's (discussion)

There are many different variables to consider when planning for an effective retrospective. While each retrospective should be unique, there are fundamental parts that need to be considered. Effective planning for your retrospective is essential for excellent results.

Tamara Sulaiman, PMP, CST is Managing Consultant at Applied Scrum where she is focused on coaching teams and organizations transitioning to Agile software development. Tamara brings over 20 years of experience in management across a spectrum of industries including: information technology, construction, international development and education to her consulting expertise. She is a Certified Scrum Trainer (CST) and Project Management Professional (PMP). As a Managing Consultant, Trainer, Coach, ScrumMaster, and Project Manager Tamara is focused on coaching teams to effectively provide value to key stakeholders and customers through the frequent delivery of software. Her passion lies in helping organizations plan and implement Agile transitions at the program level. She is currently serving on the Board of Directors for the Agile Alliance, and as a stage producer for the Agile 2009 conference committee.