

# Rushing The Tool: Sprint Planning with Distributed Teams

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Agile practices, including Scrum sprint planning, were originally developed with co-located teams in mind. While bringing the team together to plan is ideal, it is not always practical. We have recently experienced sprint planning with teams that were widely dispersed where we were able to leverage technology to create effective sprint planning sessions. An interesting technique that evolved from these sessions is something that one team dubbed “Rushing the Tool.”

Prior to these sprint planning sessions, we would advise our clients with distributed teams to leverage technology for communication (i.e. use video-conferencing and Web-based collaboration tools like NetMeeting), but not to try to plan directly into whatever tools they were using to manage the backlog. We had tried that before and found it to be deadly dull, and painfully lengthy.

Even when the team is co-located in one room, having one person with a keyboard and projecting while they typed as the rest of the team sat around the table was a sure-fire way to kill the collaborative process that sprint planning should be; when the team was dispersed across various locations, that technique was even more painful.

No, we would tell them, it’s much better to have a joint start to the planning session, use video-conferencing and collaboration tools like NetMeeting to communicate, and then have breakout sessions by location to have each individual team “Rush the Wall” for detailed planning. The final step would be to come back together as a group to discuss the results, looking for risks and dependencies.

Well, we’ve had to change our minds on that! (We learn so many things from the teams we work with as they adapt to their situations.) The tools that we used across these teams have evolved to the point where the teams could quickly and effectively plan directly into the backlog management tool. Not only could they plan directly in the tool, but it was faster and easier than trying to “Rush the Wall” separately and then come together later to share the results. Let us share with you one of the experiences that we’ve had that convinced us that this is truly a reasonable course of action.

Before we do that though, a quick explanation of the technique of “rushing the wall” is in order. This is an extremely powerful collaboration technique to help teams plan and estimate the tasks associated with the requirements (usually in the form of User Stories) being brought into the sprint. (Note: this is an extremely brief description of a single facilitation technique involved in sprint planning, not a complete description of sprint planning.)

The goal of this technique is to have everyone up at the wall actively participating in planning. Cards with the brief requirement descriptions are displayed on the wall (we like to use the 4x6 inch Post-its). Team members review each story, and write the tasks needed to accomplish this on 3x5 inch Post-its and place them underneath each story. Each task must have an estimate and delivery team member’s name associated with it.

## “Rushing the Tool” Experience

This project was working with teams in Virginia and New York. Seven delivery team members, the Scrum Master and the product owner participated in the discussion. This was their second sprint planning session. Team members were familiar with each story from their earlier discussions with the product owner. The technology used included video conferencing on a TV monitor, an open meeting tool that allowed for multiple sites to view the same computer screen and pass control of the screen back and forth, and a projector connected to a laptop showing either the open meeting tool or the Rally backlog management tool. Each team member had their laptop and was logged into the Rally tool.

The team used a standard sprint planning agenda:

## Sprint Planning

### Sprint 4: 10/2 - 10/27

- \* Opening, Welcome, Intros, Agenda
- \* Product Vision & Roadmap
- \* Development Status, Architecture, Previous Sprints
- \* Velocity in sprint 3
- \* Team - Availability & Capacity
- \* "Done" - Review definition
- \* Product Backlog: review & select
- \* Tasking out - Estimates - Ownership
- \* Challenges - Dependencies - Risks
- \* Review: Capacity required
- \* Review: Risks & Mitigations
- \* **Commit!**
- \* Parking lot, Actions
- \* Pluses / Deltas
- \* Close

When the time came for the detailed planning, the tasking, estimating and ownership team members in both locations got together in small groups of two or three throughout the room. The small groups worked on separate stories, inputting the tasks, estimates and ownership directly into the Rally tool. Questions dealt with this by simply asking the opinion or advice of another team member or group participating in both locations. The feeling in the room was very similar to having the team in the same room, working on tasking out at the wall. There was a vitality in the room, a hum of activity as team members collaborated together to work out the best plan.

The final step was to gather back together as a large group and review the sprint backlog as it had evolved in the tool. Each story and the associated tasks and estimates were reviewed by the group. Risks and dependencies were discussed and appropriate changes were made to the plan as the group continued to discuss. The final step was to get commitment from the delivery team on the sprint plan. This entire session, planning for a two week sprint, took approximately four hours.

### Lessons Learned

We've observed this technique several times now, and have some best practices to share with you:

**Use this technique with experienced teams.** This technique works best if team members already know each other, and have experience with sprint planning together. We cannot recommend the "rushing the tool" technique be used with teams new to Scrum and sprint planning. Our recommendation is to bring team members together for the first two or three sprint planning sessions if at all possible. Have them use the "rush the wall" technique using Post-its and marking pens so that they understand the collaborative nature of this planning. It takes time for teams to truly understand that they decide how this work will be accomplished, and to organize appropriately. Once the team is comfortable with planning together this way, then introduce the "rushing the tool" technique using a Web-based backlog management tool (like Rally) with the dispersed team leveraging communication and collaboration tools.

**It is worth investing in appropriate tools.** Collaboration tools are necessary for distributed teams. We haven't found one single tool that does everything yet. We have, however, cobbled together solutions from various tools that include video conferencing, conference calls, Skype and webcams, NetMeeting or other collaboration tools that allow team members to communicate and collaborate. The cost savings are realized through better communication and collaboration between team members, business analysts, senior architects, product owners and the Scrum Master. This collaboration fosters:

- faster delivery of software
- more thorough understanding of the requirements leading to
- fewer bugs
- delivering the right software (better customer satisfaction)

**Bring in an experienced coach.** We've found that having an experienced coach is very helpful in helping teams feel comfortable with the sprint planning process. Not all team members are going to be as vocal, and a good coach will be adept at getting full participation from the team. It is important to have clear agenda items and solid time boxes for those items. Plan on the agenda items taking 1.5 to 2 times longer for a distributed team leveraging communication and collaboration (unless a team of similar experience level is also there). An effective coach can lead distributed teams through the process and help them figure out how they can proceed on their own.

**Time zones are still painful.** The more time zones involved, the more pain there is. That's it. "Rushing the tool" helps to lesson the pain somewhat, but is not a silver bullet. Make sure to schedule the planning sessions in such a way that you share the pain.

**Use multiple keyboards.** To "rush the tool", each participant must be interacting with the tool; a single keyboard will not do the trick. The tool must be fast enough that each participant's updates can be seen and reviewed in seconds. Excel spreadsheets do not cut it in this instance. A tool that cannot provide the performance necessary will make this technique backfire.

**Limit the number of locations involved.** It is better to have teams in dispersed locations together rather than all individual team members in separate locations. The key to success is having team members talk to each other, not just inputting information into a tool. It is also a best practice to have different skill sets sitting together rather than separating locations by skill set. In other words, if you have a team in Bangalore, India and a team in San Jose, make sure that you have developers and testers on each team rather than having development in one location and test in another.

**More upfront planning is needed for this technique to work well.** Working with dispersed teams requires more work from the product owner in preparing well-groomed user stories. Scrum Masters in this situation will need to spend more time planning the meetings, including tools, materials and identifying

participants and ensuring that everyone understands what needs to happen and that they have the appropriate resources available. Have user stories (requirements) sized by the team in advance of the sprint planning session (with acceptance criteria well-defined), and make use of breakout sessions where locations work together to understand the goals and requirements--and then come together to “rush the tool” for detailed planning. Make sure to include time together to review the details, capture and discuss risks and dependencies, and commit to the plan as a team.

### **Summary**

Planning with dispersed teams is more difficult than planning with team members in the same room. Planning with dispersed teams can be done effectively, however, by leveraging technology and adapting techniques to fit the situation. With the “Rushing the Tool” technique it is crucial that each team member is both actively interacting with the backlog management tool and interacting with team members. It is not effective to have each team member go into the tool individually to enter their tasks and estimates separately. It is the synergy of near-real time updates and discussion amongst team members that makes this technique work well.

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