

Agile Teams - Improvement Tools and Exercises

Jesus Mendez



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AGILE TEAMS - IMPROVEMENT TOOLS AND EXERCISES

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The banner features a large photograph of the De Vere Beaumont Estate, a grand white building with a fountain in the foreground. Below this, a collage of smaller images shows conference attendees, speakers on a stage, and a presentation slide.

ABOUT THE AUTHOR



Jesus is all about helping people to find ways to reach their highest potential by offering the gift of coaching. He has contributed in delivering more than 25 projects over his combined professional career. He is a passionate reader who has spent the last five years observing, trying, documenting, experimenting and growing software development teams through different tools, games, activities and processes to help them walk through the stages of Bruce W. Tuckman's group development theory.

Find him on [LinkedIn](#).

INTRODUCTION

The tools provided in this third workbook out of three offers exercises and tools to help with improving Agile teams by providing you with a basic support when playing your role within the organization as Scrum Masters/Agile Coaches/Agile Leaders.

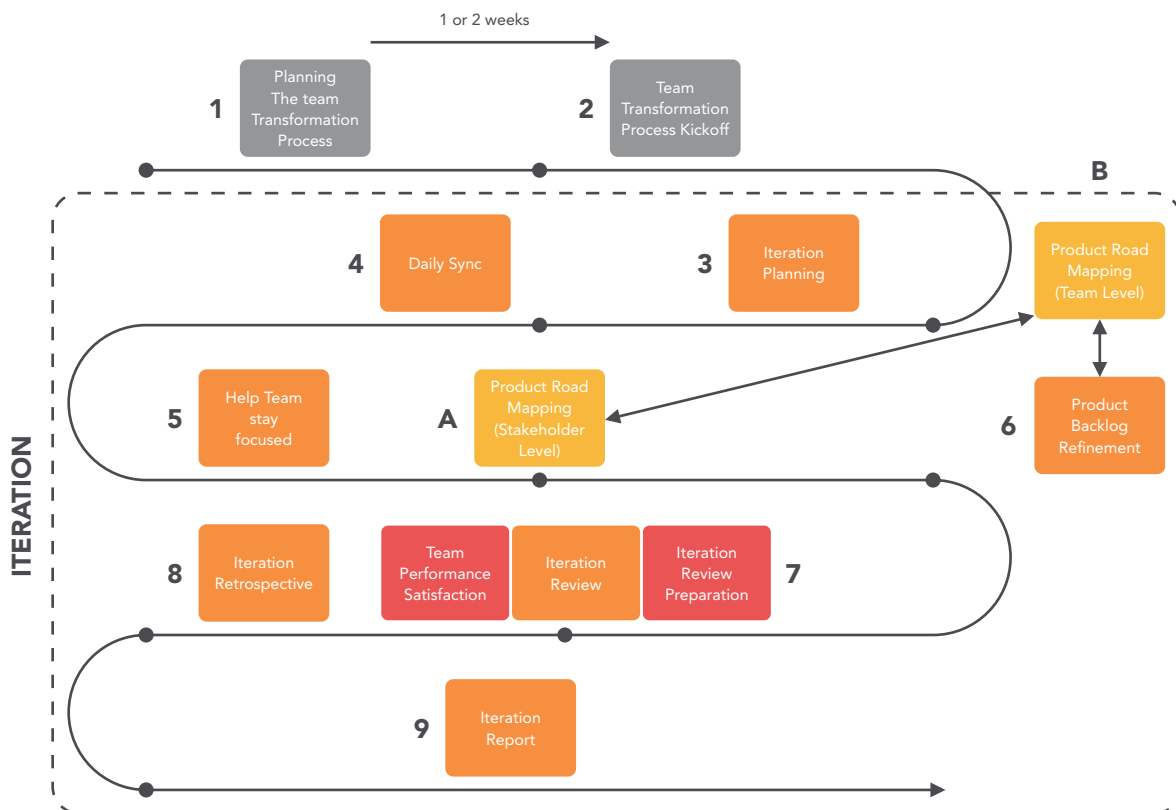
This workbook covers the step 8 and 9 of the “Forming Agile Teams Flow”, some tools and exercises I use when helping Agile teams improve continuously. The “Forming Agile Teams Flow” is a step by step process that I have created on top of the traditional Scrum framework, composed of nine steps and two alternative activities, to ease understanding and give you a better idea about what, why, how and when I recommend using the techniques suggested.

The techniques and tools exposed in this workbook are the result of a practical journey, plenty of learning, trials, a lot of reading, meeting and collaborating with beautiful and exceptional people, many hours of introspection and self-growth.

I wish you all the best with reducing your team’s ambiguity by increasing clarity through an incredible and nurturing experience.

1 FORMING AGILE TEAMS FLOW

One day, I was having a hard time getting certain thoughts out of my head; I was stuck and frustrated because that something to connect all the dots was missing. That is when, after talking about it with my friend **Ida Perciballi**¹, she proposed this brilliant idea to me of creating a workflow to walk readers through the team transformation process and contextualize where to apply the techniques that I'm proposing in this workbook for lifting off Agile teams - Iterations.



That's what I thought I was looking at; a way to explain the techniques that I've learned when forming agile teams by using a visual diagram to put all the ideas together and I came up with this diagram that I've called "Forming Agile Teams Flow", inspired by a typical sprint as described in the Agile Scrum framework.

1.1 CONTINUOUS IMPROVEMENT TOOLS

1.1.1 ITERATION RETROSPECTIVES

What type of activities would I recommend for iteration retrospectives when forming an agile team?

I've found there are some exercises that are particularly useful in iteration retrospectives when forming agile teams. These activities have been helpful to facilitate my work with teams during the forming stage; by offering structure to what the team needs to accomplish before moving to the next stage of the development process:

- 1) **Iteration Retrospective Agenda Template**
- 2) **Personal Stories²**
- 3) **How do we work? Let's map it**
- 4) **Agile at a glance**
- 5) **Team's Identity**
- 6) **Expectations**

1.1.1.1 Iteration Retrospective Agenda Template

Summary

- **Date:** Date of the iteration retrospective.
- **Status:** To do/Doing/Done.
- **Expected Duration:** X hour(s), Real duration: Y hours and Z minutes.
- **Facilitator:** Name of the facilitator.
- **Intentions:** i.e. my intentions today are to help us explore the team reactions when facing some fears that were exposed during the iteration and find ways to deal with them.
- **Retrospective Goal(s):** i.e. help us face fear and do it without distraction.

Participants

List of iteration retrospective participants

- <Team member names> + <Product Owner name>

Agenda

List of iteration retrospective proposed activities

- 1) **Set the stage** – activity: i.e. check-in question - how do you feel right now?
- 2) **Generate Insights** – activity: i.e. let's draw and share the story of the iteration with pictures.
- 3) **Gather data** – activity: i.e. what is common between each individual story? What is curious about those common factors? What do you think are the positive elements? In your opinion, which aspects in our control, could be improved? What possibilities do we have to make things better?
- 4) **Decide what to do** – activity: i.e. Open list (What, Who, By When).
- 5) **Close retrospective** – activity: i.e. Retro dart (I spoke openly?).

Notes: Additional notes/observations/take-away gathered during the iteration retrospective.

Team Backlog Action Items

List of action items decided by the team during the iteration retrospective.

1.1.1.2 Personal Stories

Purpose of the exercise: Get to know each other better (Building trust).

Time required: From one hour to ninety minutes maximum.

Pre-requisites: Post-its, markers, a table, **storytelling cards**³ or some pictures printed from internet, a facilitator.

Preparation: 10 to 30 minutes to print out the required material and set up the room. Spread cards on the table; write the name of each participant and stick them on a part of one of the walls of the room. Create/reuse the weather report on a flip chart.

How many participants: Minimum three, maximum to be determined.

Recommended: This activity is recommended with new teams, or when new team members join an existing team.

Iteration Retrospective proposed agenda

- 1) Set the stage - **Weather report**⁴ from the book **Agile retrospectives: making good teams great**⁵
- 2) Gather data - Let's share a Personal Story
- 3) Generate insights - Learning and possibilities
- 4) Decide what to do - Act
- 5) Close retrospective – Evaluate the **Team's performance satisfaction template**⁶ during the iteration retrospective.

Instructions

1) Set the stage – Weather report (10 minutes)

Welcome participants to the iteration retrospective and once everyone is in, present your proposed agenda, previously created. Once you have finished, ask the following question: “Is there any other subject that you would prefer to discuss instead?” Wait for answers. If somebody proposes a topic, ask the team what they want to do and follow whatever they want. If the team chooses your proposed agenda, then move to the next step. If they don't, then skip this exercise and facilitate the ‘new’ conversation without regrets.

- Invite them to do a **weather check**⁷, and then share, individually, how they feel. I like to use post-its and ask each team member to write down their name and include their weather check with it.
- Be curious and ask them “Who is willing to share the reasons behind your choice of the weather check report? Be silent and wait at least 30 seconds before saying anything. Remember it is their meeting, so be patient and wait. Let them talk, listening to all the answers. Once each person has finished sharing, be sure to thank them.

2) Let's share a Personal Story (20 to 30 minutes)

Explain that most of the team effort during the forming stage is going to be focused on building the relationship of trust. Given that, we are going to play “Personal Stories”. Here are the steps for this activity:

- Spread **storytelling cards**⁸ on the table. Make each one visible to be chosen.
- Ask participants to think about a personal story, something that nobody in the team knows about them.
- Invite participants to pick at least three cards from the table and then build their personal story from them.

- Invite participants to go to the pre-selected area in the room with their name on it and then stick their cards to the wall to share their personal story. Give the team three minutes to build their personal story.

Special note: I like to participate in this activity in order to share my own personal story with the team to help build the relationship of trust too, but that is optional.

- Ask who wants to share their personal story first. Then ask who is next. Repeat this step until everyone has shared their personal story.
- Invite the team to discuss what they have learned about their colleagues. In the meantime, take notes about what the team has told you they learned.

3) Learning and possibilities (20 minutes)

Explore together the following question: what do you think is possible when we trust each other? Give the team one minute to think and then invite them to share their thoughts in pairs and list at least two possibilities, one per post-it. Give the team three minutes to do that.

- Ask the team to stick the possibilities they created on the wall and then to choose the team's favorite one; give them three votes per person. They can use the votes in any way they want.

4) Act (20 minutes)

Invite them to reflect in pairs about the following question: what action could the team take to make that possibility become a reality and to start the next iteration? Give them three to five minutes. Each group should suggest at least one action item to share.

- Invite each group to stick their actions on the wall. Help the team to group them into categories.
 - Help the team to group them in categories.
 - Invite the team to decide what to do for the next iteration, who is responsible and when the action item will be completed.

5) Close retrospective - Team's performance satisfaction template (5 minutes)

Close the retrospective by thanking them for their active participation and invite them to evaluate their level of the team's performance satisfaction during the retrospective using the **Team's performance satisfaction template**⁹.

Expected outcome

- The team gets to know team members from another perspective.
- Make people vulnerable by sharing personal stories with their colleagues.
- Teach the team that being vulnerable in front of others can be fun and highly interesting.
- Create possibilities and new connections between team members.
- Build the relationship of trust within the team.
- Have fun.

1.1.1.3 How do we work? Let's map it

The Team teaching the Scrum Master/Agile Coach

Purpose of the exercise: Discover how things are done within the team and more.

Time required: 45 minutes to one hour maximum.

Pre-requisites: Post-its, markers, an empty wall, a facilitator.

Preparation: 20 minutes to print out the required material and create the **Temperature reading**¹⁰ and the **Feedback Door – Smiles**¹¹ flip charts.

How many participants: Minimum one, maximum to be determined.

Recommended: This activity is recommended when starting to work with a new team where you are going to be the Scrum Master/Agile Coach.

Iteration Retrospective proposed agenda

- 1) Set the stage - **Temperature reading**
- 2) Gather data - Let's teach our Scrum Master/Agile Coach how the team works.
- 3) Generate insights - Let's map our development process with the agile framework in use.
- 4) Decide what to do - Top two things that could be improved.
- 5) Close retrospective - **Feedback Door – Smiles by Boeffi**¹²

Instructions

1) Set the stage – Temperature reading (10 minutes)

Welcome participants to the iteration retrospective and once everyone is in, present your proposed agenda, previously created. Once you have finished, ask the following question: “Is there any other subject that you would prefer to discuss instead?” Wait for answers. If somebody proposes a topic, ask the team what they want to do and let them guide you. If the team chooses your proposed agenda, then go to the next step. If they don't then skip this exercise and facilitate the ‘new’ conversation without regrets.

- Now is time to check our individual temperature, to acknowledge how everyone feels before the retrospective starts.
- Ask participants to write their name on a post-it note and voluntarily stick it to the temperature-reading flip chart in the most convenient place which represents their current temperature.
- Once everyone in the room has done this, invite participants to look at the chart and observe the results. Acknowledge the fact that everyone is different and stress the importance of respecting this.
- Thank the participants for sharing and for their openness.

2) Let's teach our Scrum Master/Agile Coach how the team works (20 to 30 minutes)

Invite the team to teach you about the work the team does. To this end, I like to draw a starting point on the left of a white board. From there, ask the team to guide you through the workflow.

- Invite the Product Owner to tell you how an organization requirement enters the team's workflow.
- From there draw a starting point for the team's workflow.
- Ask questions about each step of the process, and repeat what the team is saying, to be sure that nothing is lost.
- Listen carefully to what the team is saying and repeat the previous step until the team asks you to stop.
- Be sure that you have covered everything.

3) Let's map our development process with the agile framework in use (20 minutes)

Now invite the team to teach you about their agile framework: Kanban, Scrum, XP, Crystal, Safe, Open Agile, etc.

- Ask the team to navigate you through the agile framework that's in use.
- Invite them to map their workflow with the agile framework in use:

- i. i.e.: Planning how to consistently develop a requirement that happens during sprint planning.
 - ii. Be curious and ask open ended questions to understand it.
- Repeat previous step until all steps are mapped with the agile framework in use.
 - Take a picture of the resultant diagram for future reference.

4) Top two things that could be improved

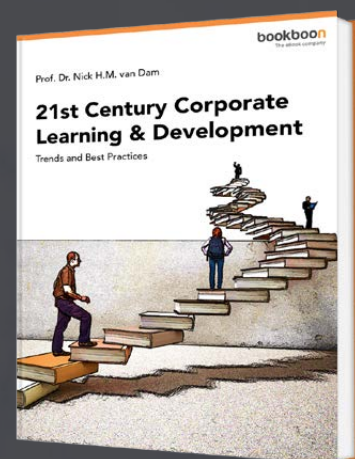
In pairs or threesomes, invite the team to invest ten minutes to identify two things that require improvement in their development process and ask them to write them on post-it notes.

- Invite each group to present its ideas to the rest of the team, by describing:
 - i. What needs to be improved
 - ii. For what reason
- Repeat previous step until all groups have shared their ideas.
- Invite the team to organize all their ideas for improvement in order of priority. Give the team all the time they need to do this.
- Take a picture of the prioritized improvement list.

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5) Close retrospective – Feedback Door – Smiles (5 minutes)

Close the retrospective by thanking everyone for the team’s hard work and then invite them to give you feedback on the ‘Feedback Door – Smiles’ flip chart. It’s up to you to ask for anonymous or non-anonymous feedback.

Expected outcome

- Shared understanding of the team’s development process.
- Team’s alignment about what’s working and what needs to be improved.
- Empower the team to own their development process.
- Install habit of continuous improvement through retrospectives.
- Get to know each other better.
- Build the relationship of trust between the new team and you as their Scrum Master/Agile Coach.

1.1.1.4 Agile at a glance

Purpose of the exercise: The goal of this retrospective is to start the conversation within the team about the team’s development process, in this case, by using the Agile-Scrum framework. By asking open ended questions, the facilitator will help the team discover the areas of improvement identified by the team, help with clarifying some concepts and show the team how easy it is to inspect and adapt their own development process.

Pre-requisites: **Agile-Scrum at a Glance – Baseline**¹³ for Scrum teams or an image from the internet of the agile framework used by the team, a facilitator, a board, some markers, some post-its and a good attitude.

Preparation: 20 minutes to print out the required material, write four bubbles and the four agile values on the board for them (using the Agile Values Cheers Up exercises references below) and create the **Retro dart**¹⁴ flip chart.

How many participants: minimum one, maximum to be determined.

Time required: Between 50 minutes and one hour, depending on how engaged the team is when discussing improvements.

Recommended: This activity can be used with new teams (everybody is new), when a new member is joining the scrum team or even when the Scrum Master/Agile Coach/Facilitator

is the one joining the team. The main focus of the activity is to get alignment about the Scrum framework, which could be used to guiding the Scrum Master/Agile Coach/Facilitator with questions such as:

- What needs to be improved and in which order (priority)?
- What is not clear/unknown about the scrum framework? (What requires reinforcement?)
- What is and isn't working?

Iteration Retrospective proposed agenda

- 1) Set the stage – **Agile Values Cheers Up**¹⁵ by Jesus Mendez
- 2) Gather data – Agile Scrum at a Glance -> Explore and identify
- 3) Generate insights – Agile Scrum at a Glance -> Discuss
- 4) Decide what to do – Agile Scrum at a Glance -> Group and decide
- 5) Close retrospective – **Retro dart**¹⁶ by **Philipp Flenker**¹⁷

Instructions

1) Set the stage – Agile Values Cheers Up (15 to 20 minutes)

Welcome participants to the iteration retrospective and once everyone is in, present your proposed agenda, previously created. Once you have finished, ask the following question: “Is there any other subject that you would prefer to discuss instead?” Wait for answers. If somebody proposes a topic, ask the team what they want to do and let them guide you. If the team chooses your proposed agenda, then go to the next step. If they don't then skip this exercise and facilitate the ‘new’ conversation without regrets.

Ask participants to write down instances when their colleagues have displayed one of the agile values.

- o 1 cheerful sticky note per example.
 - In turn, let everyone post their note in the corresponding bubble and read them aloud.
 - Rejoice in how you embody agile core values.

2) Explore & identify (5 minutes)

- Share a copy of the **Agile–framework at a glance baseline image**¹⁸ that you have printed out previously, with each participant.

- Ask the team to look at it and to write down one issue per post-it, about what: (1) requires improvement; (2) is not clear/unknown.
- Note: it's up to the facilitator to limit the amount of reported issues, so you can reach the time frame that works best for you.
- Set a time frame between three and five minutes for the team to write down their found issues.
- Once the time frame is reached, ask the team if anybody needs more time. If the answer is no, then move on to the next step.

3) Discuss (30 minutes)

- Open the floor to discussion by asking for volunteers to expose identified issues.
- At this point of the activity, it's suggested to ask open ended questions to clarify each identified issue. Questions such as:
 - What is important about the issue that you are presenting to us?
 - What have you considered when raising the issue?
- Once everyone has presented their own issue, it's time to move on to the next step.

4) Group and decide (15 to 20 minutes)

- Now that everything has been discussed, ask for a volunteer to help the team with grouping all the post-its by using the areas available in the “Agile – framework at a glance baseline image”.
- Give the team some dot stickers to vote (usually I will give each team member one vote).
- Once everybody has voted, ask them to organize the identified issues in order, based on how many dots each issue received.
- Now ask the team to identify one action that will help the team with improving each identified issue.
- **Note:** If something is not clear/unknown it is up to you to decide when to explain it. However, I usually do it once the question is raised.

5) Close retrospective – Retro dart (5 minutes)

- Close the retrospective by thanking everyone for their hard work during the session.
- Invite the team to answer the three questions asked in the Retro dart flip chart posted on the door at the entrance of the room before leaving, by sticking their name and answers, one per post it, on each of the three questions.

Expected outcome

- Common and shared understanding about where the team is regarding the agile framework.
- Things that are considered important about the team's development process are shared.
- The team is empowered to adapt its own development process to its own needs.
- A high-level actionable improvement plan has been created by the team.
- The first seed for a self-organized team has been deployed.

1.1.1.5 Team's Identity

Our ideal team (characteristics, values and a name that is worthy)

Purpose of the exercise: The goal of the retrospective is to help the team with building its identity, setting shared values and creating a name to tie everything together.

Pre-requisites: a facilitator, a board, some markers, some post-its, a set of **storytelling cards**¹⁹ and a good attitude.

Preparation: 10 minutes to set up the room.

How many participants: minimum three people, maximum to be determined.

Time required: from 90 minutes to two hours.

Recommended: I would recommend that this retrospective be done once the team's development process has been discussed, the workflow has been mapped and the team has been working together using an agile framework for at least two months.

Iteration Retrospective proposed agenda

- 1) Set the stage – “What's awesome about my team?” by Jesus Mendez
- 2) Gather data – Picturing my ideal team
- 3) Generate insights – Present and discuss
- 4) Decide what to do – Group and decide
- 5) Close retrospective.

Instructions

1) Set the stage – What’s awesome about my team (10 – 15 minutes)?

- Welcome participants to the iteration retrospective and once everyone is in, present your proposed agenda, previously created. Once you have finished, ask the following question: “Is there any other subject that you would prefer to discuss instead?” Wait for answers. If somebody proposes a topic, ask the team what they want to do and follow whatever they want. If the team chooses your proposed agenda, then move to the next step. If they don’t, then skip this exercise and facilitate the ‘new’ conversation without regrets.
- Share a blank piece of paper with each participant.
 - Invite them to write down the following text on it, covering all the empty space:
 - What’s awesome about my team is _____
And that makes me feel _____
 - In two minutes ask them to fill out the empty lines and then wait until everyone is done.
- Ask for a volunteer to read what they’ve written aloud.
- Invite the team to celebrate by cheering or applauding.
- Ask the participant to stick their piece of paper on the wall titled “What’s awesome about my team”.
- In turn, invite others to repeat the two previous steps until the whole team has completed them.
- Invite the team to be curious and ask questions about what the others have shared on their pieces of paper until there are no more questions.

2) Picturing my ideal team (20 to 30 minutes)

- Invite team members to select one storytelling card from the table that represents the image of the ideal team.
- On a big post-it, ask them to write down the top five values of that ideal team. To inspire them, search “Team values list” on Google.
- Ask participants to write down a name for that ideal team.
- Invite participants to choose a wall in the room to stick their selected picture and the list of team values on.

3) Present & discuss (30 to 40 minutes)

- Invite participants to present its selected picture, the list of team values of its ideal team and the ideal name that comes with it to the rest of the team.

- Ensure that all participants share their ideas with the rest of the team.
- Ask participants to form pairs or threesomes to talk about their ideal team.
- Invite them to join all group pictures and create their ideal team.
- Take individual team values lists to create a top five team values list.
- From the ideal team names, ask the group to choose their favorite name.

4) Group and decide (15 to 20 minutes)

- Ask the groups to voluntarily present their ideal team, its values and its ideal name.
- Repeat previous step until all groups have presented their ideal team.
- Ask groups to form one team, join the pictures to form their ideal team and choose their top five values.
- Give team members three dot stickers each to vote for the name of the team.
- Now ask for a volunteer to present the pictures (characteristics) of the ideal team, the list of values that the team is aiming for and the chosen name for it.
- Celebrate that the team has a new name!
- Take some pictures of the activity to keep names at hand if, in any case, the team decides to change it later.
- Document it all (an email is good enough) and share it with the team.

5) Close retrospective (5-10 minutes)

- Close the retrospective by thanking everyone for their hard work during the session.
- **Expected outcome** Common and shared understanding about what the team's vision of itself is.
- The team has created an entity that's tangible and has a name. This will help with leading team actions and behaviors in the future.
- A lot of fun, sharing and laughing.

Expectations

Let's make it visible

Purpose of the exercise: The goal of this retrospective is to increase the trust in the room by sharing expectations within the team. It's a way to get a better understanding of what teammates are willing to offer and what everybody expects from others.

Pre-requisites: a facilitator, a board, some markers, a copy of the expectation paper sheet per participant and a good attitude.

Preparation: 5-10 minutes to make a copy per participant of the expectation paper sheet.

How many participants: minimum two, maximum to be determined.

Time required: Between 45 minutes and one hour, depending on how engaged the team is when discussing expectations.

Recommended: This activity can be used with new teams (if all members are new), if a new member joins the scrum team or if the Scrum Master/Agile Coach/Facilitator is the one joining the team. To maximize outcome, I personally prefer to run this retrospective when the team has already done at least three or four retrospectives together.

Iteration Retrospective proposed agenda

- 1) Set the stage – **Appreciations**²⁰ from the book **Agile Retrospectives: making good teams great**²¹ taken from ‘The Satire Model: Family Therapy and Beyond’
- 2) Gather data – **Expectations**²² by **Valerie Santillo**²³
- 3) Generate insights – Let’s review our expectation paper sheets and share
- 4) Decide what to do – The one thing that I can improve
- 5) Close retrospective – **Please and Surprised**²⁴ by Unknown

Instructions

1) Set the stage – Appreciations (10 to 15 minutes)

Welcome participants to the iteration retrospective and once everyone is in, present your proposed agenda, previously created. Once you have finished, ask the following question: “Is there any other subject that you would prefer to discuss instead?” Wait for answers. If somebody proposes a topic, ask the team what they want to do and follow whatever they want. If the team chooses your proposed agenda, then move to the next step. If they don’t, then skip this exercise and facilitate the ‘new’ conversation without regrets.

- Now it’s time for some appreciations.
- Invite participants to appreciate what the others did for them or the team during the iteration and say it aloud.
- Start saying: I appreciate that <Team member name> did <thing> during the iteration. Thank you for that.
- Continue until all participants have done their round and no one speaks for at least 1 minute.

2) Expectations (20 minutes)

- Share a copy of the Expectations paper sheet that you have completed with each participant present in the room.
- Invite participants to fill out the top half of the Expectation paper sheet for themselves by answering the following questions:
 - What can my teammates expect from me?
 - What do I expect from my teammates?
- When everyone is finished, ask them to pass their paper to the left and start reviewing the sheet that was passed to them.
- Ask them to write what they personally expect from that person on the lower half of the page, to sign it and pass it on.

3) Discuss (15 minutes)

- Invite participants to take a minute to read what has been written on their expectation paper sheet carefully.
- Open the discussion by asking for volunteers to reveal their findings.
- At this point of the retrospective, it's suggested to ask open ended questions to enable communication between team members.
- Observe participants and their behavior. Sometimes people are surprised during the exercise.
- Once silence has invaded the room, it's time to move on to the next step.

4) One individual thing that I can improve (10 to 15 minutes)

- Now that everything has been discussed, invite participants to take a moment to reflect about one thing that they consider could be improved individually.
- Tell participants to feel free to share or not share their finding with the team.
- Allow everyone to take a moment to digest the exercise and take all comments and suggestions as gifts given by their colleagues they can learn from.

5) Close retrospective (5 minutes)

- Close the retrospective by thanking everyone for being so open and showing some vulnerability to help the team improve.
- Invite the team to make a quick go-round of the room and let each participant point out one finding of the retrospective that either surprised or pleased them (or both).

Expected outcome

- Expectations within the team are shared.
- Enables the team to get to know each other in a deeper way.
- First team exposure to potential judgement and direct feedback.

1.1.2 ITERATION REPORT

An iteration report is a consolidated two-page report that summarizes all the activity of the team during a given iteration. Some of the elements considered within this report are:

- Project Status (Optional)
- Sprint Status
- Progress (Includes Product Backlog Items progression and issues that occurred during the iteration)
- Risks status found within the iteration.



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When is the best moment to share the iteration report?

To use its content appropriately, I prefer to create the iteration report by the end of the iteration and share it with the team and the organization once the iteration retrospective is done and before the next iteration is over.

What's the goal of the iteration report?

The main goal of the iteration report is transparency to the organization of everything that the team has accomplished during the iteration. It's a tool to help the Scrum Master/Agile Coach support the team's progression, by collecting historical data that could be useful when forming an agile team.

Who makes the iteration report?

The iteration report is created and distributed by the Scrum Master/Agile Coach at the end of iteration.

How is the iteration report created?

The iteration report is created by using information already gathered in previous steps of the iteration; especially the data gathered using the iteration review template at the iteration review meeting. Here are the suggested steps:

1.1.2.1 Iteration Report Template – Part 1

<i>Suggested Steps</i>	
Purpose	Techniques
STEP 1 – Gather Project Status (Optional)	
<p><i>If project progress is tracked and the project information is available at the team level. The goal here is to gather that information and make it available through the iteration report.</i></p>	<ul style="list-style-type: none"> • Invite the Product Owner to fulfill this section of the iteration report by providing: <ul style="list-style-type: none"> ○ Project Name ○ Start Date ○ Estimated End Date (if available) ○ Status: <ul style="list-style-type: none"> ▪ On track: Project has progressed according to original estimation and will be released on schedule. ▪ Back on track: Project hasn't achieved what was planned originally but it will be released on schedule. ▪ Off track: Project is late and won't be released on schedule. Note: if multiple projects, add a new row per project to the iteration report.
STEP 2 – Gather Iteration Status	
<p><i>Gather iteration status from what the team has shared during the iteration review.</i></p>	<ul style="list-style-type: none"> • I take photos of what the team has shared at the iteration review and then use gathered data to complete this section of the iteration report. (Iteration Review Template content) • The data gathered is used to complete the following fields in the iteration report: <ul style="list-style-type: none"> ○ Iteration Name ○ Iteration Goal ○ Iteration Start/End Date ○ Items Forecast: Sum/Count of Product Backlog Items forecast at the beginning of the iteration in story points/amount. ○ Items Completed: Sum/Count of Product Backlog Items completed by the end of the iteration in story points/amount. ○ Number of Interruptions: Count of unplanned Product Backlog Items added to the iteration backlog within the iteration.

<i>Suggested Steps</i>	
STEP 3 – Gather Progress achieved by the end of the iteration	
<i>Identify Product Backlog items progress status and issues that impacted the team during the iteration.</i>	<ul style="list-style-type: none"> • From the iteration review template completed during the iteration review, take items gathered within the column “Things to demo” and “Updates” and write them down in this section of the report. • To complete the “Issues occurred during the iteration” section, I use the notes that I’ve collected during the iteration. To do that regularly, I use “Sticky notes” which I keep open in my computer to note things that interrupted or created an impact on the team’s regular performance during the iteration.
STEP 4 – Assess Risks	
<i>Identify potential risks and assess impact on the team.</i>	<ul style="list-style-type: none"> • Using the notes gathered during the iteration, and after validating with the agile team, I would list the top two risks and assess their impact on the team. • To assess risks, I use the following framework based on two measures: <ul style="list-style-type: none"> ○ Impact: the extent to which the risk may affect the team and includes financial, reputational, employee, customer and operational impacts. There are three main values to evaluate risk impact: Low, Medium, and High. ○ Likelihood: this is the possibility it will occur and can be represented in a qualitative or quantitative manner. There are three main values to evaluate risk likelihood: Low, Medium, and High. ○ Risk Response: after the assessment has been completed, it’s then up to the team to decide how they want to proceed with the information that was gathered. There are four main responses that accompany risk: <ul style="list-style-type: none"> ▪ Accept Risk ▪ Mitigate Risk ▪ Avoid Risk ▪ Transfer Risk

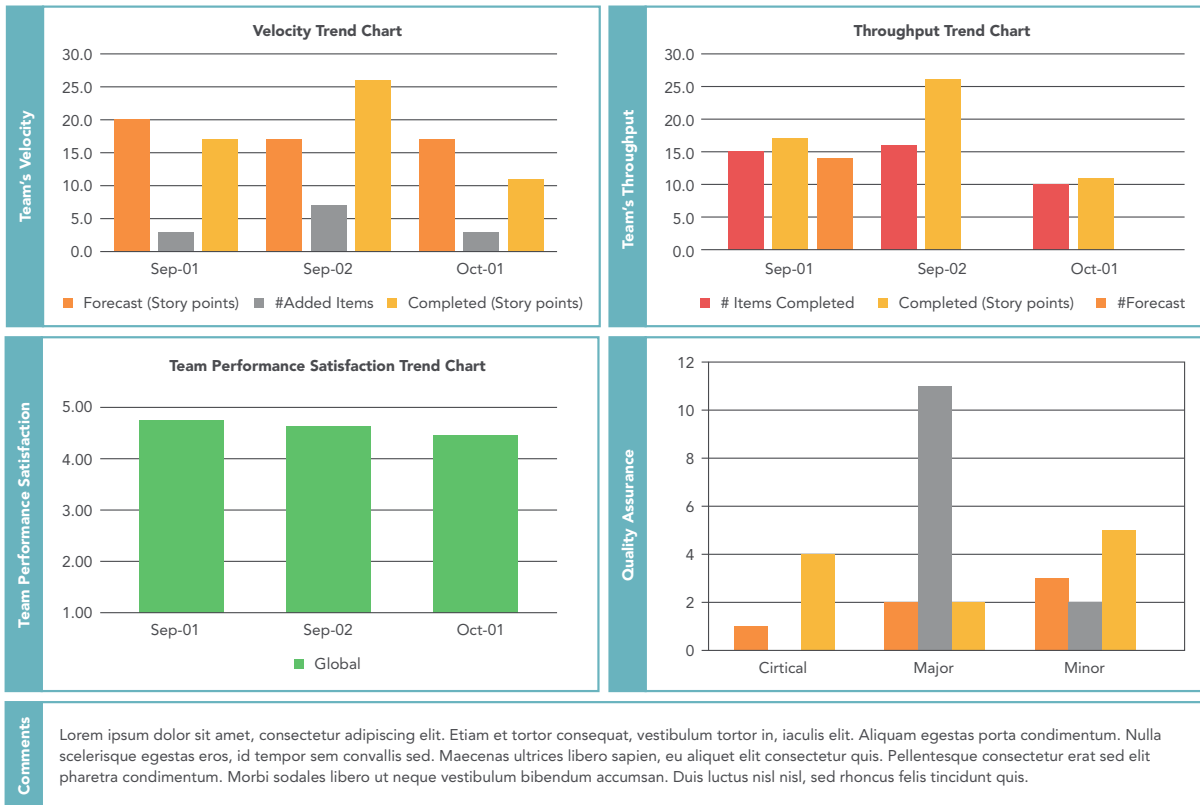
Iteration Report Template (Summary)

Project Status	Project The name of the project	Start Date - End Date
		Status: On Track/Back on Track
Iteration Status	Iteration Name The name/Id of the iteration	Start Date - End Date
	Iteration Goal What's the main purpose of the team during the Iteration? What we want to achieve?	<p>Forecast: Product Backlog Items forecast by the team, by the end of iteration planning</p> <p>Completed: Product Backlog Items completed by the team, at the end of the iteration</p> <p># Interruptions: #Product Backlog Items added to the iteration backlog during the iteration</p>
Progress	<p>Product Backlog Items Progression List of significant Product Backlog Items forecast in the iteration planning progresses i.e The login button for the members section was completed</p>	<p>Issues</p> <p>Issues occurred during the iteration List of the issues faced during the iteration i.e: The team was interrupted during the sprint to deal with a massive security whole found in one of the AB-Server-X1 Status: Issue resolved</p>
Risks	<p>Risk found during the iteration and their status List of the risks found during the iteration, their status and risk mitigation plan i.e: Risk: Technical debt could cause the team reduce its productivity, given the amount of bug found per iteration. Risk Assessment: Accepted Risk Mitigation Plan: The team will design a strategy to increase legacy systems quality starting next iteration</p>	

1.1.2.2 Iteration Report Template – Part 2 (Optional)

<i>Suggested Steps</i>	
Purpose	Techniques
STEP 1 – Team’s Velocity Trend Chart	
<p><i>Calculate and trend the team’s velocity per Iteration.</i></p>	<ul style="list-style-type: none"> • Use iteration review template ²⁵ 1 “Iteration status” column content to register a trend chart in the fields that follow: <ul style="list-style-type: none"> ○ Items Forecast: Sum of forecast product backlog items at the beginning of the iteration. ○ Items Completed: Sum of completed product backlog items in story points by the end of the iteration. ○ Number of Interruptions (Added items): Number of items added to the iteration backlog. (Count). • Use the Team’s Performance report excel sheet calculator template ²⁶, to help you create the Team’s Velocity Trend Chart for the iteration that has completed. • Copy and paste the Team’s Velocity Trend Chart created above in the corresponding box within the iteration report template ²⁷. • Save a copy of the iteration report template file for future use.
STEP 2 – Team’s Throughput Trend Chart	
<p><i>Calculate and trend the team’s throughput per iteration.</i></p>	<ul style="list-style-type: none"> • Use iteration review template “Iteration status” column content to register a trend chart in the fields that follow: <ul style="list-style-type: none"> ○ # Of Items Completed: count of completed Product Backlog Items at the beginning of the iteration. ○ Items Completed: sum of completed Product Backlog Items by the end of the iteration in story points. ○ Number of Interruptions (Added items): count of unplanned Product Backlog Items added to the iteration backlog during the iteration. • Use the Team’s Performance report excel sheet template²⁸, to help you create Team’s Throughput Trend Chart for the iteration that has just completed. • Copy and paste the Team’s Throughput Trend Chart created above in the corresponding box within the iteration report MS Word template. • Save the copy of the iteration report MS Word template file created above for future use.

Suggested Steps	
STEP 3 – Team’s Performance Satisfaction Score Trend	
<p><i>Calculate and trend the team’s performance satisfaction per iteration and profile.</i></p>	<ul style="list-style-type: none"> • Use Team’s Performance Satisfaction template content to register a trend chart in the fields that follow: <ul style="list-style-type: none"> ○ Number of Items Completed: count of completed Product Backlog Items at the beginning of the iteration. ○ Items Completed: sum of completed Product Backlog Items by the end of the iteration in story points. ○ Number of Interruptions (Added items): count of unplanned Product Backlog Items added to the iteration backlog during the iteration. • Use the Team’s Performance Satisfaction report Excel sheet template, to help you create the Team’s Performance Satisfaction Score Trend Chart for the iteration that has just completed. • Copy and paste the Team’s Performance Satisfaction Score Trend Chart created above in the corresponding box within the iteration report MS Word template ²⁹. • Save the copy of the iteration report MS Word template file created above for future use.
STEP 4 – Comments	
<p><i>Share some thoughts, reflections and opinions about the content of the trend charts.</i></p>	<ul style="list-style-type: none"> • The Scrum Master/Agile Coach of the agile team gives you permission to share your opinion and interpretation of how the team is doing. I would keep it simple and to the point as much as possible.
STEP 5 – Make It Available	
<p><i>Share iteration report with the agile team and the rest of the organization.</i></p>	<ul style="list-style-type: none"> • Explain to the agile team that reporting the status of the iteration is part of your responsibilities. Given so, let them know that you’re about to share a summary of what the team has accomplished. You will be sharing with the team and some other people within the organization. • Once I get a go signal, I like to share the iteration report first with the agile team and ask them if I missed anything by sending them an email with the report attached. • I do not wait any longer than ten minutes for feedback and send the report out to the rest of the organization.



GLOSSARY

:: A

Accept Risk: the cost to mitigate is higher than the cost to bear the risk, so you move forward.

Avoid Risk: an event of high likelihood and significant financial impact, so take a proactive stance.

:: B

Backlog: an inventory of Agile stories/tasks/items that can be selected to be worked on.

Bug: a behavior/layout problem that goes against functional specifications and/or approved design that provides business value. [Needs to be addressed, but you can choose when].

:: D

Definition of Done (DOD): a set of checkpoints agreed upon by a Scrum team to determine the completion of tasks.

Development Team: the role within an agile Team accountable for managing, organizing and doing all development work required to create a releasable increment of the product per iteration.

:: F

Forecast (of functionality): the selection of items from the Product Backlog a Development team deems feasible for implementation per iteration.

:: I

Impact (Risk): the extent the risk may affect the company and includes financial, reputation, employee, customer and operational impacts.

Impediment: anything that creates any sort of perceived resistance, friction or drag on the project. That friction can manifest as personal conflicts, slow software network problems or even technical debt. All these problems can slow down a team's progress.

Iteration: time-boxed event of 30 days, or less, that serves as a container for the other iteration events and activities. Iterations are done consecutively, without intermediate gaps.

Iteration Backlog: an overview of the development work to realize the Iteration's goal, typically a forecast of functionality and the work needed to deliver that functionality.

Iteration Goal: a short expression of the purpose of Iteration, often a business problem that is addressed. Functionality might be adjusted during the Iteration in order to achieve the Iteration Goal.

:: L

Likelihood (Risk): the possibility it will occur and may be represented in a qualitative or quantitative manner.

Line Manager: the role within an organization accountable for guiding, coaching, supporting, evaluating and assisting team members in an agile organization.

:: M

Mitigate Risk: try to control the impact of the risk; allow it but play constant attention to seek minimal exposure.

:: P

Product Backlog: an ordered list of the work to be done to create, maintain and sustain a product.

Product Owner: the role accountable for maximizing the value of a product, primarily by incrementally managing and expressing business and functional expectations for a product to the Development Team(s).

:: R

Risk: a situation involving exposure to damage, harm or loss.

:: S

Scrum: a framework to support teams in complex product development. Scrum consists of Scrum Teams and their associated roles, events, artifacts, and rules, as defined in the Scrum Guide TM.

Scrum Master: the role within an Agile Team (Especially in Scrum Teams) accountable for guiding, coaching, teaching and assisting a Scrum Team and its environments in a proper understanding and use of Scrum.

Stakeholder: a person external to the Agile Team with a specific interest in and knowledge of a product that is required for incremental discovery. Represented by the Product Owner and actively engaged with the Agile Team at Iteration Review.

Stories: items that are created for an agile team to work on that have business value. They are based on customer wants and have validation criteria associated to them.

:: V

Velocity: an optional, but often used, indication of the average amount of Product Backlog turned into an Increment of product during the iteration by a Scrum Team, tracked by the Development Team for use within the Scrum Team.

NOTES AND REFERENCES

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Section 9: Iteration Report

- Risk Management concepts on this section inspired from Cathy Axais, my boss and Quality Assurance specialist at Seedbox Technologies Inc.

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ENDNOTES

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