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Creating Great Teams

How Self-Selection Lets People Excel

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Creating Great Teams

How Self-Selection
Lets People Excel



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David Mole

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Contents

	Acknowledgments	vii
	Foreword	ix
	Introduction: Self-Selection and Why You Should Care	xiii
1.	The Art of Stable Team Design	1
	Today's Work Demands Stable Teams	1
	The Need for Speed	2
	The Science Behind Team Design	4
	What Next?	9
2.	Preparing for a Self-Selection Event	11
	Self-Selection at Scale	11
	Step 1: Conduct a Readiness Check	13
	Step 2: Run a Trial	15
	Step 3: Get Permission	18
	Step 4: Define the Teams to Select	20
	Step 5: Coordinate Logistics	24
	Step 6: Communicate Early and Often	25
	What Next?	28
3.	Getting Ready for the Day	29
	Step 1: Define the Rules and Constraints	29
	Step 2: Create a Facilitation Plan	32
	Step 3: Prepare Frequently Asked Questions	34
	Step 4: Prepare Materials and Stationery	36
	What Next?	41
4.	Running a Self-Selection Event	43
	Step 1: Set Up the Room	44
	Step 2: Welcome People as They Arrive	46
	Step 3: Introduce the Day	47

	Step 4: Let Product Owners Pitch	48
	Step 5: Explain the Rules	50
	Step 6: Get people started: One, Two, Three, Go!	51
	Step 7: Conduct a Checkpoint Review	51
	Step 8: Rinse and Repeat	53
	Step 9: Tackle the Outstanding Problems	56
	Step 10: Wrap Up	57
	What Next?	57
5.	After Self-Selection: Now What?	59
	Making It Real	59
	Defining Squad Start Dates	61
	Kicking Off a New Squad	62
	Supporting Squads	65
	What Not To Do	65
	What Next?	66
6.	Insights	67
	People Appreciate Self-Selection	67
	Relationships Are the Deciding Factor	69
	People Respond Well to This Level of Trust	70
	What Next?	71
7.	Long-Term Effects of Self-Selection	73
	The Effect on Happiness	73
	The Effect on Squads	76
	The Effect on Managers	76
	The Effect on Productivity	77
	The Effect on the Company	78
	Now It's Your Turn	78
	What Would You Do If You Weren't Afraid?	79
	Bibliography	81

Foreword

As a consultant and expert in organizational dynamics, I've worked with scores of organizations, and over the course of four decades, I've observed hundreds of teams and team formations. In many of those cases, the focus was assembling the required mix of technical skills—as if the skills existed apart from the people who had them.

Many years ago, I worked for a big, multinational corporation. The company had technology centers spread over every time zone. Every possible skill was represented somewhere in the company. “Couldn't we save money and avoid hiring new people if we could make efficient use of those resources?” an executive wondered.

Every technical employee filled out a profile and became an entry in what was called the Global Skills Inventory (GSI) database. When the executives approved a new initiative, a manager created a skills list and cranked up the database. The manager fed in the requirements and—boom!—the GSI spit out a list of “resources” deployed for the project “team.”

It's easy to see the faulty reasoning behind the GSI database. People are not interchangeable units, and technical skills are only part of the equation when people need to work collaboratively.

But what about the traditional way, relying on management judgment to form teams? I've seen selection processes range from very informal—what my friend and fellow agile coach Don Gray calls the Five You's Method (“You, you, you, you, and you. You're the team.”)—to very formal processes with job analysis, selection criteria, interviews, testing, and auditions.

Even with the most rigorous process—and in spite of managers' good intentions—the likelihood that any group of people actually gels and becomes a team is low. A few teams soar, many more slog along, and most don't show the level of responsibility and engagement managers hope for.

Fundamentally, two factors determine whether a group will forge itself into a team:

- Do these people want to work on this problem?
- Do these people want to work with each other?

Neither a computer program nor a manager can answer these questions. Only the employees who will do the work can. And that's the subject of this lovely and useful book.

Some managers worry that given the option to self-select, people will act like high-school kids and choose people they like and work that appeals to them. Yes, people may choose those they like to work with on work that seems interesting. That seems sensible to me. People work best when they have choice over what they work on and who they work with. Managers worry that some work won't be chosen—failing to account for employees who will do less-than-thrilling work because they understand that it's necessary for continued operations and place high value on that.

Managers want engaged teams who take responsibility and show initiative. But these concerns hint at a contradiction: a belief that employees won't make responsible decisions left to choose their own teams. Management selection for teams actually works against team responsibility by communicating that people aren't capable of making responsible choices about work and coworkers. However, when teams self-select they're much more invested in success. Team self-selection creates the conditions for team engagement and responsibility.

How do you go from managerial selection to self-selection? If your only image is chaos or choosing up sides for sports—it makes sense that team self-selection looks like a dubious undertaking. It's not as simple as putting everyone in big room and letting them mill around until they find a group they like. As Sandy and David explain, thought and preparation are required for successful team self-selection. This book shows you step by step what successful team self-selection looks like. It provides enough detail so many more managers can imagine how trying team self-selection might look and feel in their own organization.

Sandy and David's book is radical in that it upends the traditional role managers have in hiring and selecting people for teams. It's utterly un-radical in that it shows a practical way forward—based on what researchers have known for years:

- People want to do a good job and contribute to their customers and companies
- Employees work best when they have choice
- They take more responsibility for their own decisions than those made by others
- Collaborative work depends on relationships
- When you treat people like adults, they act that way

Managers need to paint the vision of what needs to be done, organize the work in a sensible way, identify constraints, and then let employees choose their own teams.

This book will help many managers realize that the opposite of managerial team selection isn't chaos. It's commitment, creativity, and engagement, which is what they've been searching for all along.

Esther Derby

Co-author of *Agile Retrospectives: Making Good Teams Great* and *Behind Closed Doors: Secrets of Great Management*

November 2015

Introduction: Self-Selection and Why You Should Care

Fast growth has a way of forcing organizational change on a business, but it also presents opportunities to try new ways of working. When Trade Me, one of New Zealand's biggest ecommerce providers, hit a new level of growth, we saw an opportunity to drive productivity by reorganizing the company into small, stable agile teams.

We found the best way to do it was using self-selection: trust the people who work in the organization—the engineers, testers, business analysts, designers, user experience professionals, and product owners—to come up with the best way to structure their teams. It seemed radical when we started, but it worked. Removing the managers from the equation and trusting in the employees involved created a fascinating story and incredible outcomes for everyone.

What Is Self-Selection?

Self-selection is a facilitated process of letting people self-organize into small, cross-functional teams. Based on the belief that people are at their happiest and most productive if they can choose what they work on and who they work with, we think it's the fastest and most efficient way to form stable teams.

To avoid confusion, we're not referring here to self-organizing teams. *Self-organizing teams* are groups of motivated individuals who work together toward a shared goal and have the ability and authority to take decisions and readily adapt to changing demands. We like self-organizing teams, but that's not what this book is about.

This book is about self-selection, which is a process you can use to set up self-organizing teams in the first place. Self-selection happens at an organizational level rather than at a team level and is a way to get everyone into teams. Another term for a self-selected team is a *self-designed team*.

Why Should You Care?

If you work in an industry that benefits from people working in small, cross-functional teams, then this book is for you.

If you are a CEO, CTO, head of projects, VP of engineering, agile coach, head of marketing, or any other kind of manager who wants to structure your organization or department into small teams, you will learn why self-selection is the fastest and safest way to do so. You will learn how to prepare for and organize a self-selection event, how to convince your fellow managers that it's a good idea in the first place, and how to communicate with your self-selection participants to make sure everyone is on board and ready.

If you are a team member, developer, tester, UX designer, or business analyst, you will read about what it feels like to be part of a self-selection process and what the consequences are for your daily work. You will learn how to influence your colleagues and your bosses to be open to the idea of self-selection. You will be able to provide your boss with a plan for how to facilitate a self-selection event and evidence that the system works.

This book describes a process that will work whether you need to form teams from scratch, want to improve the design of existing teams, or are on the verge of a big team reshuffle. How do you know that the teams in your organization represent the best possible combinations of people? How do you know that everyone is working in the team they would like to work in? There's only one way to find out: ask them; then let them decide. By giving your staff choice through self-selection, you allow them to establish the best designed teams, and you will get the most out of your company.

Self-selection is a great way to get going if you don't have fixed teams yet or to revitalize people if you feel your organization or teams are stuck in a rut.

We've seen self-selection work time and time again with teams building software, websites, and apps, but we've also found that these principles translate to other industries and fields where people can or should work in small teams, such as marketing, sales, human resources, and even finance.

We've Done It, and So Can You

Our first trial self-selection event was in October 2013 at Trade Me, one of New Zealand's biggest ecommerce providers. Since then we've run the largest self-selection process we know of and repeated the process many times across multiple locations. Many more companies have since used our ideas and processes to run self-selection events across the world.

In this book we share a case study of how we used self-selection to decide on the structure and composition of twenty-two new agile teams across Trade Me's technology department—a process that involved more than 150 people. We also demonstrate and explain a repeatable process for facilitating a self-selection event at scale.

Our aim is to convince you that self-selection is not only valid but also highly rewarding and can be a successful and positive approach for all kinds of organizations.

Who Are We?

We're Sandy Mamoli and David Mole, and we spent several years doing transformational work with Trade Me. If you aren't from New Zealand (or Australia at a stretch), then the chances are you will not have heard of the company we're talking about. Trade Me is an iconic Kiwi brand with more than 3.7 million accounts, and more than a million New Zealanders will have bought or sold something via the site in the past year.

The site is a popular place for Kiwis to buy, sell, and trade everything from cars and antiques to clothes, crafts, property, and farm gear. It's a Kiwi success story, having grown over the past sixteen years to a unique position where it commands more than half of New Zealand's domestic Internet traffic, serving more than one *billion* pages per month. For context, there are only 4.5 million people living in New Zealand, a country with Internet penetration up around 86%.

Trade Me has also been growing pretty fast. A year ago there were 110 employees in their technology department; now there are approximately 250. In total, there are more than 450 staff members at the time of writing and no sign of the growth slowing down anytime soon.

What Problem Did We Need to Solve?

The organization had reached a point where the technology department was increasing in size by roughly one person a week, but they noticed that adding new people no longer meant they were getting more done; if anything, the speed of delivery was actually slowing down. At the time people weren't organized into fixed teams; rather, the teams were assembled at the start of a project and disassembled when the project ended. Employees were not dedicated to a team or project; their time was split into percentages and their assignments were determined by their manager.

Over the course of time a web of dependencies had evolved whereby every person and project were reliant on someone else, and there were always a significant number of handovers and delays between groups of people. Projects were constantly being paused and put on hold because there was no one available to work on them; everyone was busy somewhere else. No one had an overview of the people and the projects, so there was no big picture of what was happening.

Sound familiar?

We wanted to avoid the delays caused by waiting for staff to be freed from other projects, and we wanted to minimize handovers with their associated loss of tacit knowledge. Our strategy was to pull people out of this complex matrix and move them into fixed, stable teams where we could ensure that one person would work on only one team, and one team would work on only one project at any time. (Note that we use the term *project*, but technically it was more of a value stream or initiative, as there frequently was no hard start or end date.)

So, let's get started. In the first chapter we dive into what a stable team design looks like and why it's so important. Then we break down the process we took to guide Trade Me through a self-selection event, beginning with how we created the right context and ending with how we facilitated it toward a successful outcome. (While we discuss Trade Me's self-selection success story, this book was a completely independent project and not affiliated with or associated with Trade Me in any way.)

Preparing for a Self-Selection Event

In the following two chapters we outline everything you need to know to prepare for a successful self-selection event, from checking that you're ready to getting the materials in place for the event itself. We explain why this level of preparation is important and discuss some of the challenges you can expect along the way.

In this chapter we guide you through the things you need to think about and prepare weeks or months in advance. How much time you need before your self-selection event depends on the scale. As a rule of thumb, if your event involves more than sixty people, you'll need to start planning at least six weeks in advance.

We also guide you through how to conduct a readiness check, get permission to run the event, communicate the concepts and plan, coordinate the logistics, as well as under which circumstances to run a trial event.

Preparation is vital!

Before we start on the initial steps, it's important to emphasize how vital it is to prepare well in advance. In fact, we suggest erring on the side of overpreparation, mainly because it will give you the best chance of success, and also because it will put your mind at ease and make you a more relaxed facilitator.

Self-Selection at Scale

The most immediate question we faced at Trade Me was how we could facilitate a self-selection event at scale. Should we follow the Lancaster bombers' lead to get everyone into a giant hall and simply tell them to get on with it? Or was there a more structured way that would make the people involved more comfortable?

We tried researching the concept, but it appeared that either no one had carried out a self-selection event at this scale before or, if they had, they hadn't published the process or results. This meant we had to design and develop our own self-selection process from scratch.

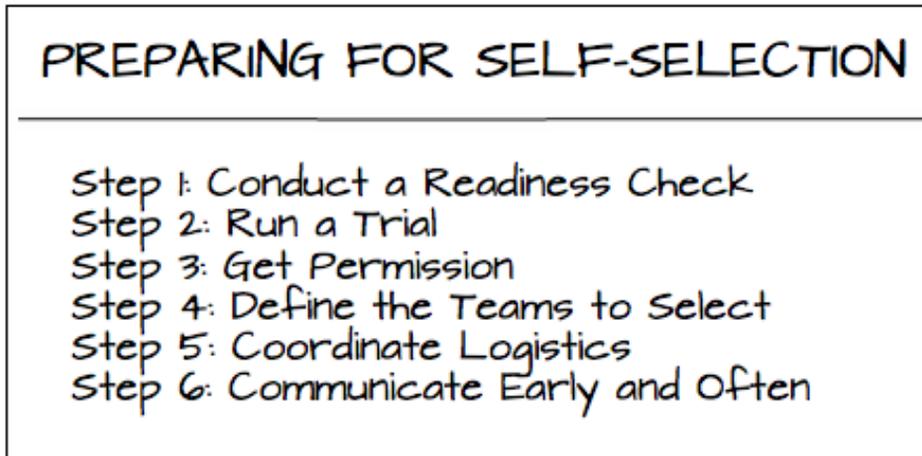
We spent months planning our first squadification and put an incredible amount of thought into the details.

Sandy describes what was involved in those early stages:

After we had made the decision to run a self-selection event, we spent months planning it. We had to come up with ideas for how to facilitate it, so we ran a trial in one of our satellite businesses. In the end we spent a full day just preparing the office materials we would need—cutting out photos of more than 150 people, making templates, and creating visual signals for ready/non-ready squads.

We spent a lot of time setting up and creating the environment. Even though we didn't control what was happening during the day, we put a lot of time and effort into creating an environment that would be as conducive as possible to a successful event.

Now that you understand that you're going to have to roll up your sleeves to start planning your event, we'll explain the steps in detail to ensure that you're ready to conduct your own self-selection event. The following graphic shows the first six steps of the process:



We start with how you can identify whether you're ready to run an event and what you'll need to have in place up front.

Step 1: Conduct a Readiness Check

We believe that any company could run a self-selection event, or at the very least be able to actively demonstrate the principle of giving people autonomy to choose whom they work with. To get started, you'll need to ask yourself a series of questions in order to understand whether you have everything in place to be successful. The following checklist outlines the considerations you should make before you embark on self-selection:

ARE YOU READY FOR SELF-SELECTION CHECKLIST

- Do you have, or can you get, support from senior management?
- Are people open to trying self-selection?
- Is this the right time to self-select?
- Do you or can you have stable cross-functional teams?
- Do you feel personally ready to try this?
- Are you confident that this can work in your organization?
- Are you ready to answer people's questions?
- Have you considered a trial or a twenty-four-hour hackathon?

If you answer no to any of these questions, that's okay. Don't give up! It just means you might have slightly more groundwork to do. It's important to know your starting point, and we'll talk you through some of the ways to make progress in each of these areas.

In some cases you may need to tackle other problems in the run up. For example, if you're still discussing whether people can work in stable, cross-functional teams, you may struggle to get employees to choose a new home. In that case you may want to dedicate some time to researching, experimenting, and problem solving first. In our case, before embarking on self-selection we certainly had to identify and work through a number of problems, including staff members working on too many projects and having ad hoc project teams formed and disbanded according to whichever project was

highest priority at the time. By the time we self-selected, we had tested and demonstrated why small, stable, cross-functional teams were the way forward.

While the previous questions are aimed at the company, it's also important to consider if you yourself are fully prepared. It's likely that people will have lots of questions and probably some criticisms, so it's important you be ready for lots of upcoming conversations and persuasion.

We would be lying if we told you we weren't nervous about embarking on our first self-selection event. We were acutely aware that we were reorganizing one of New Zealand's most iconic businesses using a process that was unproven at the time. We honestly had no idea whether it was going to work! By the time you finish this book, you should be confident that the process will work and feel reassured by the case study, but you should still be prepared to be challenged and questioned as you suggest something that may be radically different from what your organization has done in the past.

Managers and coworkers are likely to ask you questions and voice concerns; it could be to test your ability to persevere or to discuss genuine concerns about the event itself. The most frequently asked questions before a self-selection event are usually these:

- What if a fight breaks out as people argue over joining one squad?
- What if someone gets picked on and pushed around by others?
- What if one person ends up standing in the corner on his own like the last kid chosen for sports at school?
- What if people want to join a squad they are totally unskilled and inappropriate for?
- What if one particular squad or area is very popular?
- What if no one wants to work in a particular area?
- What if no one turns up, out of fear or because they don't like the idea of self-selection?

The questions you will be asked could be somewhere along those lines, and you should expect to be asked lots of questions. You will know the people involved and how best to handle your responses, but it may also be helpful to refer to responses like these:

Only after we had proven the success of working in small, cross-functional teams in one part of the organization did we look into scaling the approach elsewhere.

- We have an expectation that employees will behave like trusted adults and resolve their problems themselves.
- We have confidence in the process; it has been tested it and it works.
- When we choose teams by managerial selection we often get things wrong.
- It's worth a try.
- Even if it doesn't fully work, we will learn a lot about the staff, their preferences, and their relations, which will be useful for whichever direction we choose to take.

Self-selection can be a scary concept. There's no certainty that self-selection will work for you, but thorough preparation will help reduce the uncertainty as much as possible and increase the likelihood of success.

If you're still debating whether to go ahead at this point, one way to get an insight into the potential outcome is to consider running your own ShipIt Day and ask people to self-select into teams for the day. This will allow you to see how they react to self-selection in a safe environment. If they can figure out how to self-select for a twenty-four-hour hackathon, there's a good chance they'll figure it out in real life, too. It will also make employees feel more confident when you can point to a real and recent example they've been part of. (You can read more about [ShipIt Day on page 7.](#))

Step 2: Run a Trial

After you determine that you and your organization fulfill the prerequisites for self-selection, the next step is to run a trial self-selection event to become familiar with the process and mitigate risks by anticipating and addressing them in a smaller context. A trial in this sense is a scaled-down self-selection with fifteen to twenty people (or two to four teams), which will give you a lot of information at little cost. (If your self-selection involves fewer than thirty people, your life will be easier, and there's no need to run a trial first. You can go directly to [Step 4 on page 20.](#))

We opted to carry out a trial self-selection event at one of our satellite offices, which gave us a more controlled environment and fewer people with whom to test and refine our process. We ran the event with just twenty employees and started with a crudely defined process, which involved iterations, discussions, and lots of sticky notes with names on them. By the end of the day, twenty people had self-selected into three squads, and we knew that we now had a basic process that we could refine to work with any number of people.

After Self-Selection: Now What?

By now you will have successfully run your self-selection event. You've watched people react brilliantly to the level of trust you placed in them, and now you're faced with the job of making your squad diagrams real.

The question is, now what? In this chapter we explain the process and steps you need to take to make the outcomes of the self-selection event a reality and quickly and efficiently transition to your new structure.

Making It Real

At the end of a self-selection event, you usually end up with a lot of paper and hopefully a set of self-selected, fully skilled teams. But so far this information is just a collection of diagrams. You now need to go about making it real.

After the event, the participants often have a lot of questions about what's going to happen next, when they can start working in their new squads, and whether this is actually for real or if there will be some last-minute management decree that changes some of the teams that have been designed.

Protecting the outcome of your self-selection event is critical.

In the immediate aftermath following a self-selection event, it's crucial to confirm that this really is an accepted process and that everyone's choices will be respected. The organization needs to be aware that any change decreed or decision overruled by management will erode the foundation of trust and empowerment you just established, and in fact, the company would be left worse off than if you had used management selection from the beginning. Therefore, protecting the outcome of your self-selection event is critical.

The first thing to do is follow up with each of the newly formed squads. It's important to discuss ideas and concerns and, perhaps most important, to

find a date members can start working together. We usually run a meeting with each of the squads using the Lean Coffee¹ format, which is a useful way to run an agenda-less meeting, where the topics for discussion are established by the squad itself. This allows us to manage expectations and to hand over responsibility to the squads to make it happen.

Lean Coffee

Lean Coffee is a structured but agenda-less meeting. It's a fast-paced, timed discussion where people get together, decide on an agenda, and start talking. A Lean Coffee starts with participants populating a kanban board with the topics or items they want to discuss. This forms the agenda and they discuss one item at a time for a set time. (We like three to five minutes.) Participants move a sticky note to "Doing" and discuss the topic before they move it to "Done."

Once the time for that item expires, the group decides whether to keep discussing the topic and add another time slot or move on to the next topic. The meeting ends when the agreed time is up or when there are no more topics left to discuss.

You should meet with each new squad as soon as possible, ideally the very next day. It's vital that you build on the momentum you've created and don't let people go back to their regular jobs without closure from the self-selection event. You need to set the expectations for what will happen next.

You can expect some or all of these questions during these Lean Coffees:

- *When can we start and what happens to our current projects?*

People are simply wondering "What now?" Do they continue with their current work? Do they need to finish it as fast as possible or hand it over to someone else?

- *Are we adequately resourced?*

If there were any gaps in your newly created squads, people will be wondering how and when they will be filled. "Does everything we have established get put on hold until we recruit new people? This could take months!"

- *What about logistics?*

For example, how will the seating arrangements be configured for the new squads? What are the time and date of the squad's first meeting?

1. <http://www.leancoffee.org>

It's a great sign of engagement when people are concerned about their current work and don't want to abandon existing projects. It would be a far more dire situation for the company if they didn't care at all. However, ongoing projects often create a web of dependencies where everything is dependent on everything else and there's no obvious place to start.

At Trade Me we were a bit like a tightly wound ball of string with no visible thread; we needed to cut into the ball to make a start. We had to consider the new hires who had been suggested as part of the selection process. Nobody wanted to wait for those people to arrive, but equally nobody wanted to start before the squad was fully skilled. In general we pursued the earliest starting point regardless of what talent were waiting for.

Kick squads off as early as possible. There will never be a perfect time, so if in doubt, go for sooner rather than later. Establish the new squads and let them cover for those who haven't started yet. It's not a big deal because it drives the kind of cross-functional "team-first" behavior you want to see.

Defining Squad Start Dates

It's important to create (and stick to) a schedule, especially if you have many squads, projects, and people. You get to choose whether to do this via a date-driven plan like a Gantt chart or a scope-based approach like a backlog of tasks. Don't let anyone drift, because you're likely to find some people will be frustrated waiting for their new squad to start and others will be gold-plating their existing project not knowing what comes next.

In our case we were dealing with a large organization with many ongoing projects, and we were growing rapidly. It took us almost two months to finish transitioning existing projects to the new squads. Among the contributing factors were unwieldy projects, Christmas holidays that happened to fall soon after, new recruits, and internal movements. We were constantly aware of the danger that until we had established the new squads, something could happen to stop or delay the formation of the new structure. This would have been a devastating blow to the people who had self-selected, so we worked hard to keep momentum. We recommend you do the same!

David says:

Looking back, it was fascinating to see how those months were filled with little bursts of energy and enthusiasm when a new person arrived and a number of employees would be freed up and a number of squads could start. It felt a bit like when the perfect shape comes down in Tetris and we could fill three or four lines all at once.

It's helpful to make the timeline of your plan highly visible to everyone in the office. Display a large calendar with planned start times for squads and check them off and celebrate squads when they launch. We believe that transparency is an important part of keeping things going and not losing momentum.

One thing we didn't do in the beginning but have introduced to later events was regular follow-up meetings, usually every week, with the not-yet-formed squads to keep their focus and buy-in. Here people can raise whatever issue they like. It could be anything from dealing with change that inevitably comes along, such as "What are we going to do now that the project will take longer than we thought to complete?" to "What should we do now that the new hire won't start until four weeks later than we originally thought?" The answer is inevitably something those involved should decide, but the important thing is that squad members have the opportunity to voice their concerns and to creatively solve problems.

One main concern people often have is whether their squads are adequately resourced. Fundamentally, this is a sign that some squads don't feel confident that they're up to the task. It's understandable that they feel nervous and it's a natural part of any team formation. Reassure the squads that you trust their self-selection and that if they find after three months that they need another person or more of a particular skill, they'll be able to make the changes.

Kicking Off a New Squad

As things fall into place, you will often have new squads starting in rapid succession. You need to make sure that they're given the best possible start. After all, while the significant team-design part is now complete, 30% of a team's success will depend on how it's launched, as discussed in [The Science Behind Team Design on page 4](#).

During self-selection people prove that they can be trusted to solve complex problems, know what's best for them and the company, and act as trusted adults. In the spirit of letting people control their way of working, we never mandate whether a squad should run scrum, kanban, their own special creation, or a traditional way of working. Following Daniel Pink's principles of motivation,² one of the key forms of autonomy is being in control of your processes. Giving people autonomy over who they work with should be extended by letting them choose how they work together.

2. http://www.ted.com/talks/dan_pink_on_motivation?language=en