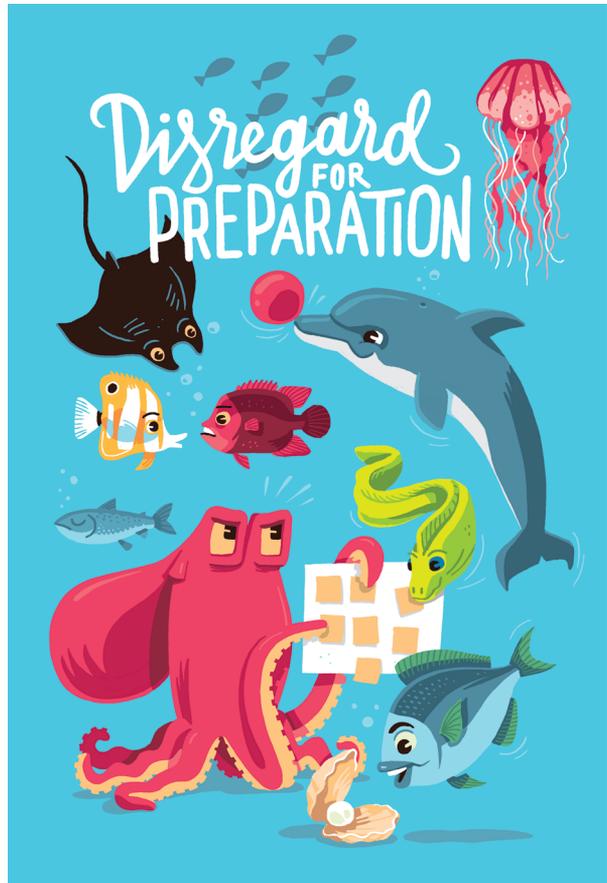


Disregard for Preparation

... in which the facilitator initially misjudges how much preparation an online retrospective requires and later learns how to prepare for it wisely

Chapter 13



CONTEXT

A specialist who happens to be living on the other side of the world joins the team, and now Sarah has to facilitate distributed retrospectives with a new team member. After years of facilitating retrospectives for the team, she knows the team members, what activities are efficient for them, and what they believe works for them. It is difficult for her to see how these activities will work in an online retrospective, but she is too busy to spend time learning how distributed retrospectives are different. She sets up a distributed online retrospective by sharing an empty document and inviting the team with a video conferencing tool.

When the retrospective is about to start, Sarah logs in to the video connection and the document she asked them to use. Unfortunately, only the new specialist and two other team members are online when the retrospective is supposed to start. The other team members arrive during the next 6 minutes, but the round of questions she had decided to start the retrospective with has to be repeated twice because more people keep joining the meeting after she thought that everyone who was able to be there had joined.

When everybody finally is present in the video conference, she can only see five people in the document, and when she asks them about it, she can hear the rest desperately trying to enter the shared document. Some have misplaced the link, some have forgotten their password, and another 5 minutes are lost in this process. Having lost 11 out of 60 minutes, Sarah is a bit frustrated but tries not to let the team notice. For the Gather Data phase, she wanted everybody to add three lines about what they like, what they don't like, and what questions they have. When the third item is added to the document, the new specialist starts a long description of the issue, and Rene adds to it.

Rene and the specialist start their own little discussion, and Sarah is unable to stop it because she cannot use her body language in this online venue to direct the team's attention and indicate that they need to move

on. She finds it difficult to change the setting online, since all she has is a document, which leaves her unable to throw in a new activity to make people talk in smaller groups or write more issues as she would have done in a real-life setting.

The retrospective ends when the time is up with the team having discussed only one subject. In fact, most of the people in attendance had already started looking at their email before the retrospective ended, and there was no real wrap-up with action points, experiments, or lessons learned. The momentum of the retrospective, if there ever was one, was lost.

GENERAL CONTEXT

It is becoming increasingly common that teams are geographically distributed and retrospectives must be conducted online. An online setting seems incompatible with the best practices of facilitating retrospectives, since facilitating is very much about reading body language, listening to the things that are not said out loud, looking at where and how people choose to stand and whom they choose to whisper with, and so on. All of these activities are harder or impossible online. Also, an important part of a retrospective is that people show respect for each other by not using their phone or reading email. This expected courtesy is hard to implement in an online retrospective.

In addition, an online retrospective must be kept short. I normally do not make them longer than 45 to 75 minutes. It is harder for people to keep their attention on the retrospective without the physical aspect of walking around that normally is part of a retrospective. Although I think this might be solved with future technology, we are not there yet. Also, scheduling longer online meetings is difficult: due to the distribution, people may be in locations where they have conflicting all-hands meetings, or they may be in different time zones, so the retrospectives must be arranged to accommodate people's need to eat, sleep, pick up children from kindergarten, and so on.

Disregard for Preparation is an often recurring antipattern for distributed retrospectives and has huge consequences. Sometimes, the retrospective facilitator is asked to facilitate an online retrospective without much notice, perhaps because the original facilitator is indisposed, and the new facilitator has little time for preparation. In addition, if the facilitator has never facilitated an online retrospective before, he or she might not be aware of the added challenges inherent in this setting.

ANTIPATTERN SOLUTION

What sometimes happens is that a retrospective is set up with an invitation to a video conference tool (Meet, Zoom, Skype, Teams, etc.), and a document (Google Drawings, Miro, Mural, etc.) is shared between the invited people. Perhaps someone has talked about a theme for the retrospective, but otherwise, it is often an example of “Just show up—we will figure it out.”

CONSEQUENCES

The only reminder for an online retrospective is whatever technical reminders are set up in the calendar. In a real-life meeting, you might be prompted by seeing your colleagues get up and go to the meeting room. In consequence, people come at the very last minute to the online meeting or, too often, a few minutes late.

As a result, the facilitator starts with 5 minutes less than planned in a retrospective that perhaps was originally just scheduled for 60 minutes with up to 10 people. And still, the facilitator is expected to Set the Stage, Gather Data, Generate Insights, Decide What to Do, and Close the Retrospective in the time remaining. Without preparation, it might look like this: “Okay, welcome to the retrospective. Who has something they want to share?” Someone starts talking about a subject close to his or her heart. If the facilitator does not stop this person in a reasonable amount

of time to hear what others want to share, the retrospective could just revolve around the subject that the first person brings up.

In a real-life retrospective, the facilitator would more easily be able to detect that others are waiting to share and make sure people are aligned in their discussion, because it is easier to read people in a face-to-face meeting and to change the activities accordingly. Of course, these retrospectives also need preparation, but the facilitator's job is simplified when he or she can observe the dynamics taking place in the room and find activities that fit the situation.

If a retrospective becomes focused early around one particular subject, this may be a very important subject that someone genuinely needs to discuss, but no one else is heard, and there is no consensus that this is the most relevant topic for them to discuss.

If the retrospective is not wrapped up on time, it can nevertheless come to an abrupt end as people suddenly log off and go to other meetings, since it is much easier, socially, to leave an online meeting than to leave a physical room. In the worst-case scenario, these online retrospectives consist of either speeches from the **Loudmouth** (Chapter 18) who likes to talk the most or a discussion between a few team members with no full agreement on experiments. They become status meetings, the soul-destroying evil twin of the retrospective.

SYMPTOMS

The retrospective starts later than planned because people are late. When they arrive, they have trouble logging into the document, or they don't share video (see the **Peek-A-Boo** antipattern [Chapter 16]), or they mute themselves. Some people stay quiet because there is no activity planned for them to share. The agenda is impossible to follow, and the retrospective ends abruptly.

REFACTORED SOLUTION

Prepare for the retrospective in a number of ways. For example, make a shared document,¹ and send an email at least 1 day before the retrospective with a link to the shared document and ask team members to make sure they can access it. If the team was warned at the last retrospective that they were expected to prepare for the next retrospective by populating the shared document with virtual Post-it Notes, you can remind them when you send the link. You can also ask them to start filling in the document before the retrospective. In that way, you can save some time in the retrospective, and it might be easier for some people to fill in the document about positive and negative events when they can sit quietly alone with their calendar. Then, when the retrospective starts, you can set aside some time for them to read all the inputs. With this approach, everybody is prepared. It works well and has been implemented by companies such as Amazon, where the first 10 minutes of every meeting are set aside for people to read the document in order to have everyone prepared and in the right mindset for the meeting contents.

Send an email again on the day of the retrospective 15 minutes before it begins, reminding the team that this is a good time to get coffee. Otherwise, people forget until the very last moment. Then they will want to get coffee, and then when they get up, they notice they need to go to the toilet. At this point, the first 5 to 7 minutes of your retrospective have already been wasted.

It is also important to prepare a detailed schedule for the retrospective. Be aware how much time you have for each phase in the retrospective, and do your best to stick to it. If you can see it is not enough time, ask the team what they would like to do about it. Extending an online retrospective is usually not an option, so the realistic options are to choose only one of

1. I prefer Google Drawings because it gives more freedom on the fly, when you need to change something quickly, and because it is easy to use Drawings to simulate using Post-it Notes on a board. But boards can also be made in Miro, Mural, and Trello.

the subjects on the board to discuss or to arrange a follow-up retrospective. Either option is a better alternative to just hurrying to the end of the retrospective and letting everybody log off without a wrap-up.

As always, have a backup plan for the retrospective, another agenda that allows for a change without demanding a lot from you. Retrospective facilitation, like most software development, should be agile, as described by Joseph Pelrine (2011), and plans should be followed by actions and feedback loops. This is described in more detail in the Cynefin framework (Kurtz & Snowden 2003), where *complex systems* should be dealt with in a probe-sense-respond fashion: you try something out, sense what happens, and respond to the reality instead of following a complicated plan.

Preferably, everyone should have his or her own camera and be in separate rooms. This can be hard to achieve, but it prevents in-real-life subgroups of people from having a parallel discussion on their own.

If you choose to have a physical board in one of the rooms, instead of a shared document online, you might want to give each person an *avatar*, also called a *proxy*, someone who acts on behalf of another person who is not physically present. Set up a phone call or a chat between two people and let the avatar write Post-it Notes for the person he or she represents.

In summary, you should do your best to make everybody equal at an online retrospective, even if you feel the odds are initially against it. One benefit of online retrospectives is that it seems more natural to make all discussions using the *round robin* technique, instead having free-flow discussions in the plenary.

Round robin is a pedagogical pattern, described by Bergin and Eckstein (2012), that I use extensively in my teaching.

What Is a Round Robin?

A round robin is an approach to asking people to speak in turn to ensure that every voice is heard. Everyone gets to answer a question, choose a subject, or comment on something, one after another. If they are sitting around a table, it could follow the seating arrangement; if online, it could follow the list of names you have for the people in attendance. Sometimes, it is necessary to set a time limit on each person's turn—for example, allow each person one minute—but most of the time, people are mindful that time is limited and that everyone has to say something in the round robin. It is sometimes difficult to make people wait for others to stop speaking because they are afraid that they might never get to share their input. With a round robin, everyone knows that they will get a chance to speak, so they let others speak without being worried that they won't have a turn.

There is a hidden danger in the round robin: sometimes, one person says something that you think is really good, and in that case, you might feel tempted to thank the person or point out how great his or her input was. Try to avoid that temptation, though, and make everything said equally important or interesting to avoid discouraging anyone from contributing. You can also choose to thank everybody after they have said something. But choose all or nothing.

ONLINE ASPECT

Since this antipattern is in the context of an online retrospective, everything applies to an online retrospective. For offline retrospectives, much of the advice in the refactored solution can be helpful. For example, it is still a good idea to remind people about the retrospective a day in advance, especially if there are some experiments the team decided to try out. Then the person responsible for giving feedback on how the experiment ran has some time to prepare. Making everybody equal is also important for an offline retrospective, and this can be done by making sure that everybody is heard, as described in Chapter 18, **Loudmouth**, and Chapter 19, **Silent One**.

PERSONAL ANECDOTE

I was invited to facilitate an online retrospective. I spent some time talking to and emailing with the person who invited me in order to make the best retrospective possible given the circumstances. In most cases, when I facilitate an online retrospective, I do it from my home office, but in this case, I was asked to facilitate from the company's premises.

When I arrived for the distributed retrospective, three people were in the same room as me, two others were together in another location, and the last two were alone, so we were eight people in four locations. One of them took the meeting from his phone, and, as we discovered later, he was in a coffee shop. Had this been a meeting where the team needed only a one-way flow of information from me, their scrum master, or from their manager, it would probably have been okay. But in a retrospective setting, no one person is more important than any other, and everybody should have an equal chance of both listening and being heard.

The usual thing happened: the people I could not see had also chosen not to see us, so we were only audio to them. The coffee shop participant was mostly invisible and fortunately muted due to coffee bean grinding, and the other was in front of her computer. As a result, when I asked for feedback or stories behind something, I always had to ask them twice. The typical "Oh, please repeat that, as I didn't get it" or "Ah, you were talking to me; please say it again" were heard.

This is very typical for unprepared distributed retrospectives: you may have set up a document and a virtual meeting, but you have not prepared the people attending for what they need to do in order for everyone to gain from it.

When I am an ordinary participant in a boring online meeting myself, I sometimes play Solitaire when I am just listening. I have learned that it takes the edge off the boredom while still keeping me alert enough to jump in when needed. (I would never do that as the facilitator, naturally.) My husband watches 30-minute-long fractal zoom videos on YouTube during boring meetings. If you try this, remember to mute the sound!