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My name is Heidi Helfand, I'm here to tell you stories from my role as a Principal Agile Coach at AppFolio. I'm now an independent contractor advising companies on having successful reteamings.



I'm also a mom. These are my kids. I encourage people to bring their "whole lives" to work. Once you do that, other good things come "for free."

Scrum Pattern

"Keep the teams 'stable' to have predictability" -Scrum Plop

"Change control?"

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People misinterpret “stable” to mean keep your teams “the same.” Reteaming is when you change up your team composition. We’ve reteamed at AppFolio deliberately. It’s how we **grew** our company. It’s also how we’ve encouraged continual learning. It’s also how we’ve increased the fulfillment of our engineers.

Humanistic Pattern

“Focus on fulfillment in teams
and individuals”

I prefer a lens on teams in which we seek to create the conditions in which people thrive. Their learning is energized. The teams are rockin.’ The people would never even think about joining another company. They are truly excited to come to work each day. Reteaming is part of that.



Reteaming is one way that we can energize the learning on teams by acknowledging that hey, people change, their interests change..we accommodate them on their quest for fulfillment. That might show up by enabling them to switch teams, or to place someone new on their teams. Imagine if you were in the same session at this conference all week. You might need a change. Why not enable people to change up their learning contexts at work?

BUILD RELATIONSHIPS



Building relationships facilitates later reteamings. Here is a random collection of engineers socializing at an overnight retreat. If you know and care about the people you work with, everything else is easier. Don't call me a co-worker, call me a friend. When we work together, the positivity is increased. That might help us get through conflict easier when we are in the midst of it during product development.

FORMING

**Tuckman's Model
1965**

STORMING

NORMING

PERFORMING

ADJOURNING 1977



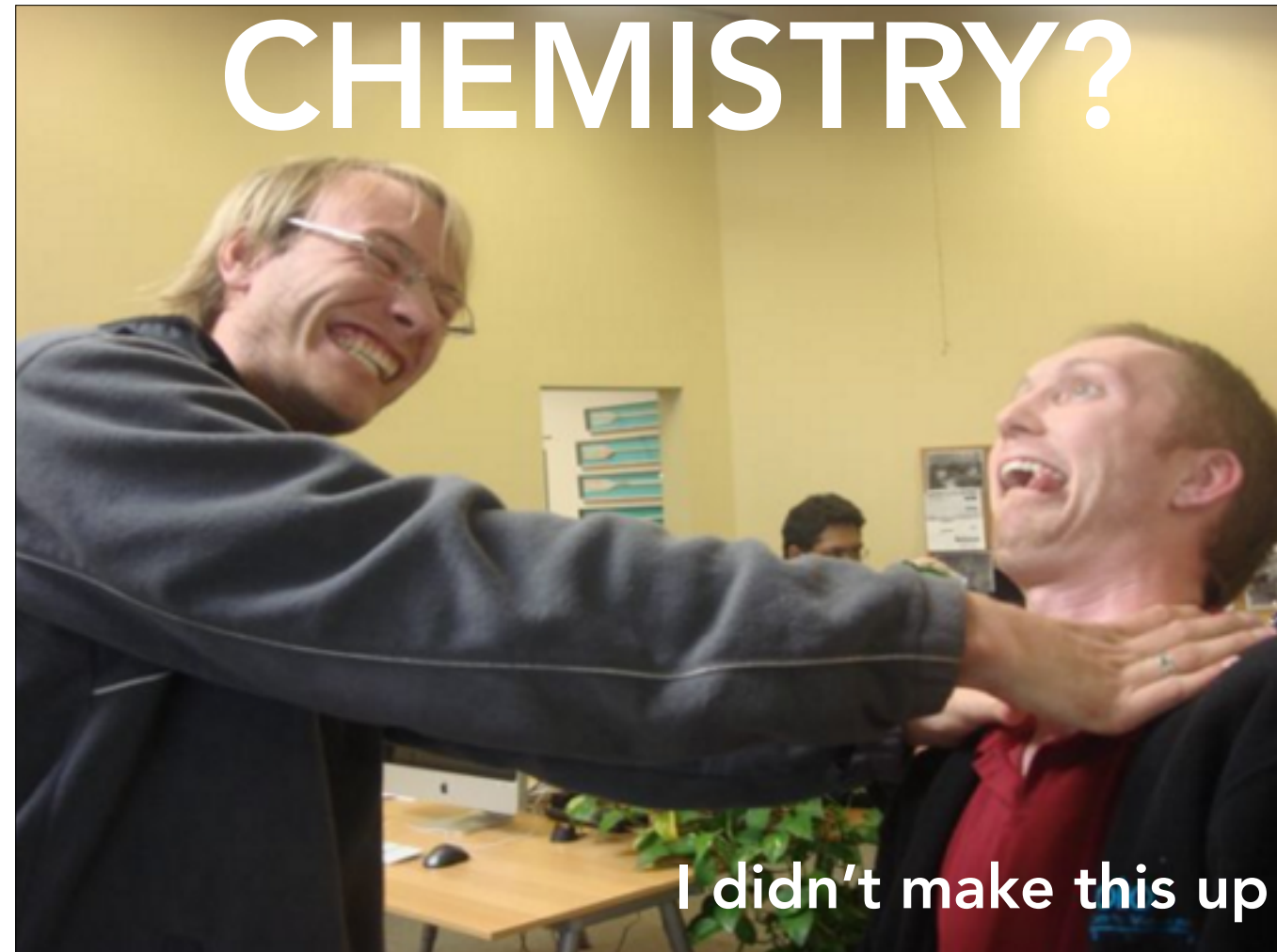
This is the Tuckman model, which is one of the most widely-quoted models of teams in organizational development. Did you know that it was invented after Tuckman did a review of the existing literature from group therapy? That's not exactly software development, is it? Nevertheless, through the years in the software industry I've heard people referencing this model over and over. Don't get me wrong, I think there is some value to the model. I just think there are some shortcomings to it. One is that this is a linear model - it reminds me of waterfall in that it was developed around the same timeframe. Conflict is an iterative process, and the storming phase here implies that you get the conflict "done" and then continue on to become a performing team. In addition, the model implies that the goal is to have teams that stick together without change. Based on my study, I have discovered that Tuckman neglected to mention a phase in his model.



It's a little known fact that Tuckman didn't mention a stage that I feel should be part of his model. It's the stage called STAGNATING.



It's when you keep your teams together for "too long" and people do not enjoy working with each other anymore. That impacts their productivity and enthusiasm with their jobs. They do not feel fulfilled or excited to come to work.



Or maybe they really don't get along. It could be a lack of chemistry or worse.



I didn't make this stuff up. In fact the theme of "stagnation" came up in the study I did at AppFolio. Here are a few clips from the research, illustrating that discovery. Clip 1: unless you actively have a source of new info into your teams, the learning can stagnate over time. Visiting another team or having a new person join your team can bring new learning. Clip 2: when you mix it up with people you've never worked with before, and none of your teammates have ever worked with before there are new opportunities for learning...even "hot keys". Clip 3: If the team stays stagnant, the abilities you have stay stagnant. We have people on the global engineering team for a reason, they're good at different things, so mixing them up [to spread the learning] is important.

Reteaming is when you change your teams.

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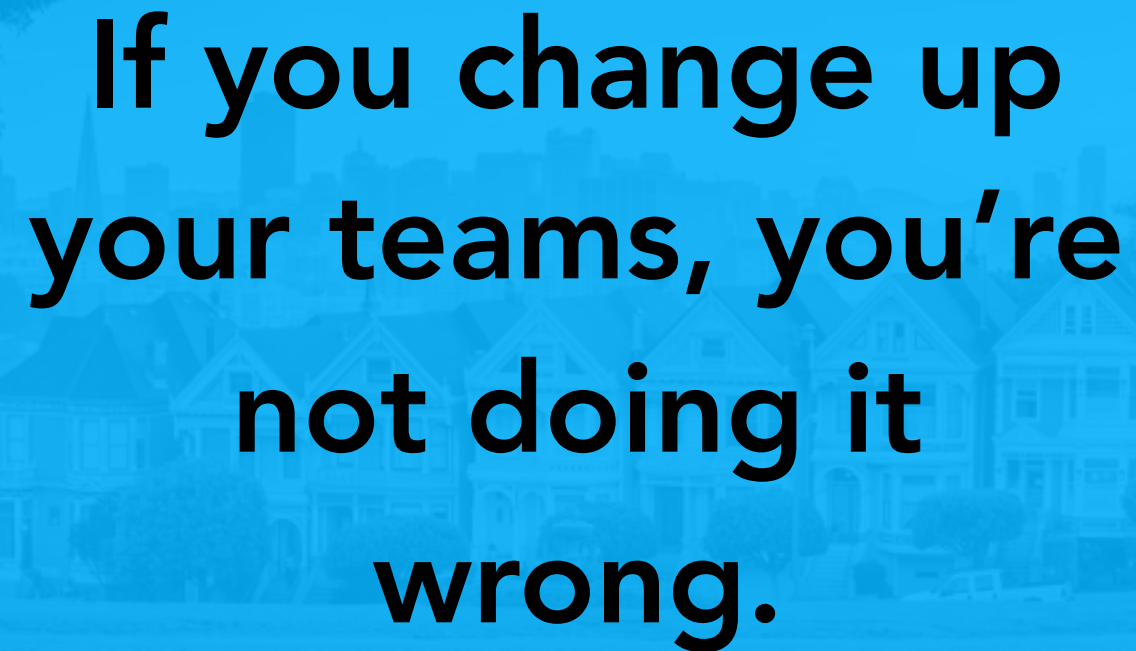
Reteaming is when you change up your team composition. We've reteamed out of necessity. It's how we **grew** our company. It's also how we've encouraged continual learning. It's also how we've increased the fulfillment of our engineers.

ADD OR REMOVE 1 PERSON



-Paul Tevis & ORSC

How do you change a team? You add or remove 1 person. Here's Gary a web front end specialist on his first day at AppFolio. He's bringing with him new ideas and he can share them with his new team. He also brings a fun artistic perspective - he often creates photoshop illusions using faces of his coworkers.



**If you change up
your teams, you're
not doing it
wrong.**

As agile coaches I remember us struggling with “best practice” advice saying we should keep our teams the same, within a very dynamic and adaptive company with high rates of change. It was almost like the feeling of “we’re doing it wrong.” It turned out, however, quite the opposite. I think reteaming helped us thrive as a company.



**Reteaming could
be the secret to
your success.**

AppFolio has been able to grow and adapt over time. It's contributed to our success.

RETEAMING

for 9 years

People

2007

Time

2016

Appfolio has been reteaming out of necessity for 9 years. It's one way we grew the company from 10 to 600 people



I can't imagine how reteaming didn't contribute to our success. We went public last year. We continue to thrive. We are experienced entrepreneurs. Prior to AppFolio, some of us built another startup where we invented gotowebinar and gotomeeting. We know what we are doing. At AppFolio we make software for property management teams and law firms. We enable the digital transformation of countless small businesses by eliminating cumbersome paper-based, or antiquated software based workflows.

DeSimone Real Estate Services, Ocala, Florida

They were so thrilled with AppFolio they had an office party to celebrate their 1 year with AppFolio:

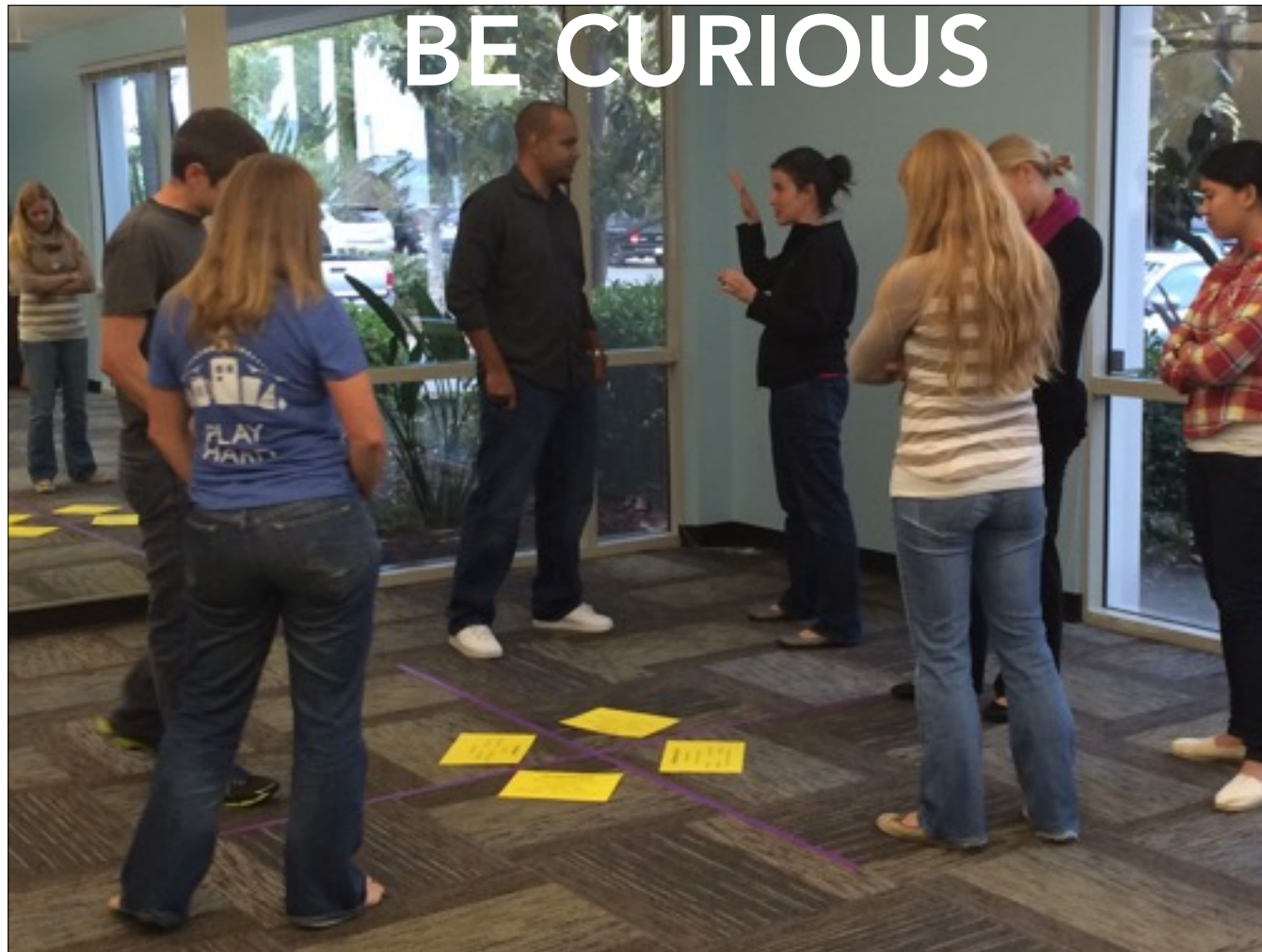


Customers love us too. This customer in Florida baked a cake and had a party to celebrate their anniversary with our AppFolio Property Manager software.



Also, we were voted by our employees as one of the best places to work via Glassdoor in the small business category this year.

BE CURIOUS



I'm not saying that reteaming is the answer to all challenges into an organization. If a team is having issues, maybe a different type of intervention is more appropriate. Here is a team working on their communication patterns and preferences with each other.

CHOOSE THE SPEED



I'm also not saying reteam at the fastest, most dynamic speed all the time. You can dial things up and down to meet human and business needs. Some people might want more change. Some people might want less change. The business can choose to ramp up hiring or team switching. The business can choose to slow it down as well. These are deliberate decisions. So you step on the “gas pedal” accordingly.

We built AppFolio to Continuously Learn & **Adapt** -Klaus Schauser



Adaptive Teams

The vision from the start of our company was that we would build a learning organization that is adaptive. One of our founders Klaus Schauser emphasized that point to me after I interviewed him for my reteaming study.

ADAPTIVE TEAMS



CAN WORK ON ANY FEATURES

Teams can work on any features that come their way, or that they pull into their teams. This team is so happy because a customer sent them cookies after they delivered a feature recently. The accountant that uses the feature told them that their work has saved her three days of manual data entry per month.



Our developers are very adaptive. They work the full stack. They share ownership of code. They volunteer to help each other via code stewardship. They also get really good at interacting with customers. They are encouraged to develop their business and communication skills so that they not only become good engineers, but also good business people.

XP-TDD-CONT INTEGRATION

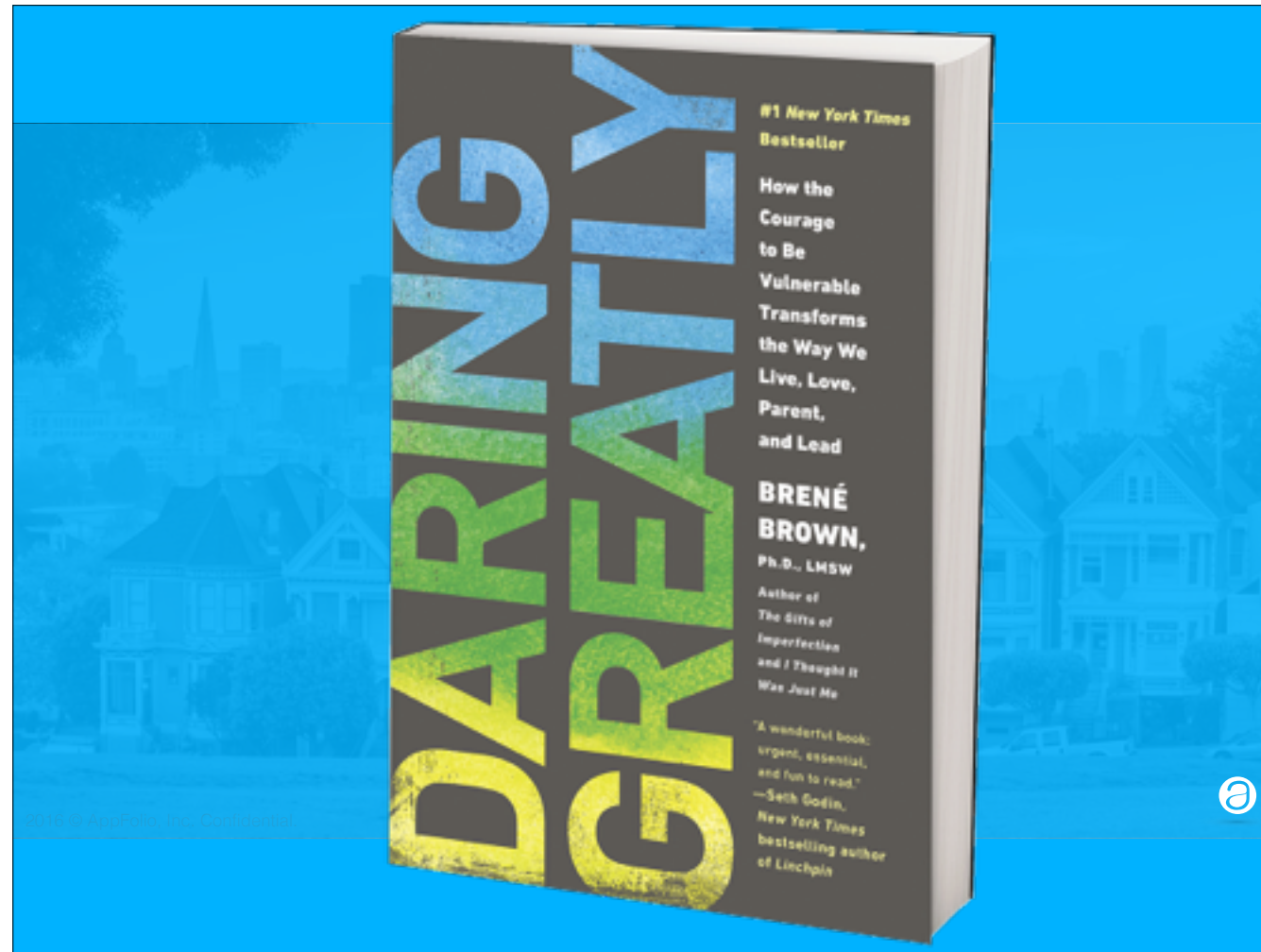


At AppFolio, our teams grew up agile with XP and strong technical practices from the start of the company. We have spread and maintained technical practices throughout the years via pair programming.

Reteaming Case Study

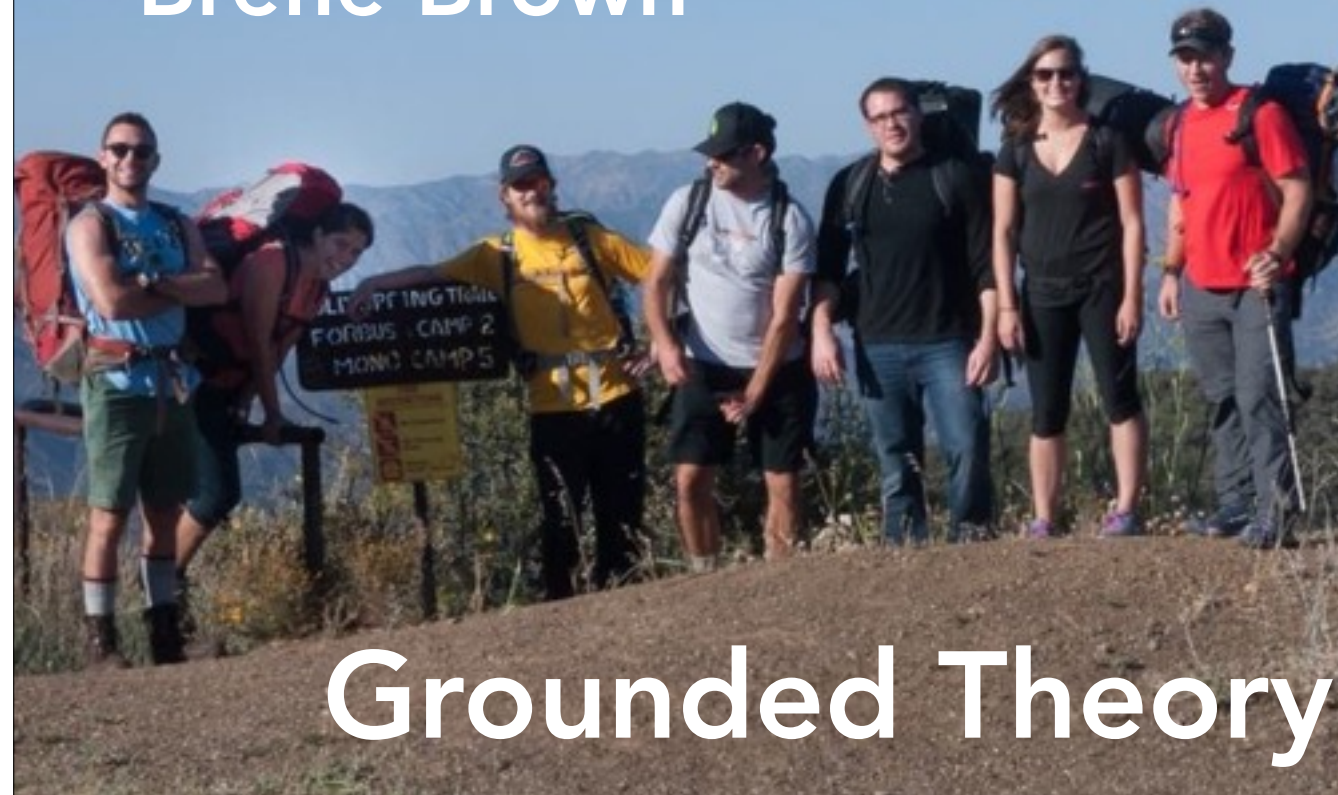
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So I read this Brene Brown book and was enthralled with her research methodology described in the back of the book.

“Stories are data with a soul.”
—Brene Brown



Grounded Theory

It's called grounded theory. Basically what you do is interview people on a topic. Transcribe the interviews. Code the data for themes, and write about the themes. So that's what I did.

16 people
16 hours/data
Coded for themes
Patterns emerged



Interesting patterns emerged in the data regarding how and why we've reteamed over the years.

We've Reteamed to...

Scale

Learn

Liberate

Listen to
the Code



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Here are some of the reasons why we've reteamed.

RETEAMING TO SCALE

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GROW & SPLIT



Here's how big our first team got. Then we split it into two teams.

ADD NEW TO EXISTING TEAM



When people arrive en masse, one way to integrate them is to spread the load across several teams. That causes reteaming among 7 teams. It causes people to move out of desks to make room for the new people. It causes a ripple in the system. You get used to it if it is a regular occurrence.

MENTORS



We traditionally have paired up new people with mentors and brought people up via pair programming to spread practices. The mentors had a checklist that got revised continually, and we also had special talks set up for new hires. We've evolved our new hire onboarding tremendously over the years, due to systemic, double loop retrospectives.

RETEAMING TO LEARN

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VISITING "PAIRFESSOR"



To spread knowledge, we might have one engineer join a team for a couple of weeks to help educate the team on an area of the code that he knows quite well. After a while, he leaves that team.

LEARN SPECIALTIES



We switch teams to gain specialized knowledge. We have a few specialized teams, and the rest are teams that can theoretically work on any feature. You may see rotation of team members from specialized teams into feature teams and vice versa. Tech support engineers may want to hang out with a feature team to gain knowledge to help them be better equipped to support that feature in the future. Members of feature teams may spend some time in an infrastructure or data center team to get a different type of experience, and then return to their teams. It's nice to have the opportunity to grow, develop and learn at work like this.

DYNAMIC RETEAMING



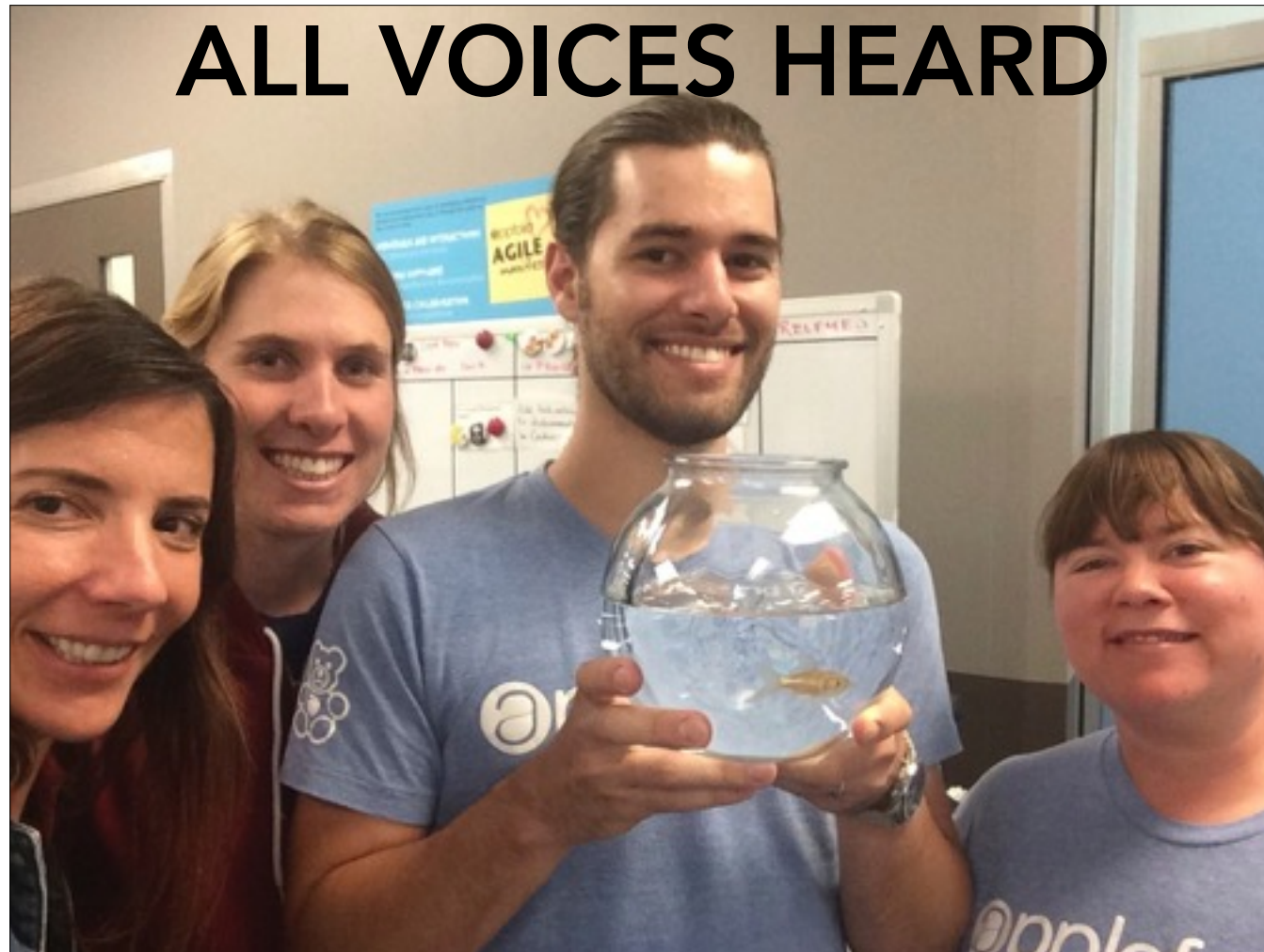
Here's a story about frequent team switching to learn. We grew our company via doing XP since our first team. We would switch pairs and reflect on the rate at which we switched, and would adjust that based on the needs and preferences of the team. When we grew to 3 teams, the teams started working on their own in parallel. That limited the pairing variety present on each team. Our developers voiced that they wanted to have one developer rotate from team to team on a regular basis. Doing that brought new ideas and perspectives to the team. It brought a reunion of friends who enjoy working together and who had experienced a loss from not being on the same team anymore. There were real human reasons for the importance of this dynamic reteaming. People ask me what the rate of switching was. In this video the participant tells us how that was every sprint or two - at that time we were either doing weekly or biweekly sprints. It's a decision for the developers and the business to determine the rate of reteaming - whether it's more or less frequent. And, the meaning of the word "dynamic" is connected to how people view the concept of change. So "my" dynamic might be less dynamic than your definition of it.

RETEAMING TO LIBERATE

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ALL VOICES HEARD



If you're with a team and it grows bigger, and you notice when some of the people on the team are in silence, not participating in planning or other thematic work, you may have discovered a team within a team, and then you can break it off so that they are no longer prisoners in meetings. Instead, they can reinvent their process to be appropriate for what they are working on.

PROCESS FREEDOM & NEW COMPANIES



This is a photo of the team that created the first version of a product we had called securedocs which was for secure online document storage. That product wound up becoming a separate company spawned by AppFolio. You could say that this reteaming ultimately spawned this separate company! When we developed this product, an initial team was formed by taking people off of existing teams, and putting them off to the side. giving them complete process freedom. This gave the team the opportunity to have smaller feedback loops to manage the uncertainty of the work at hand. The engineer I interviewed for my study shared that the team had hourly sprints. This process freedom helped this team go faster by doing what was appropriate to them.

RETEAMING TO LISTEN TO THE CODE

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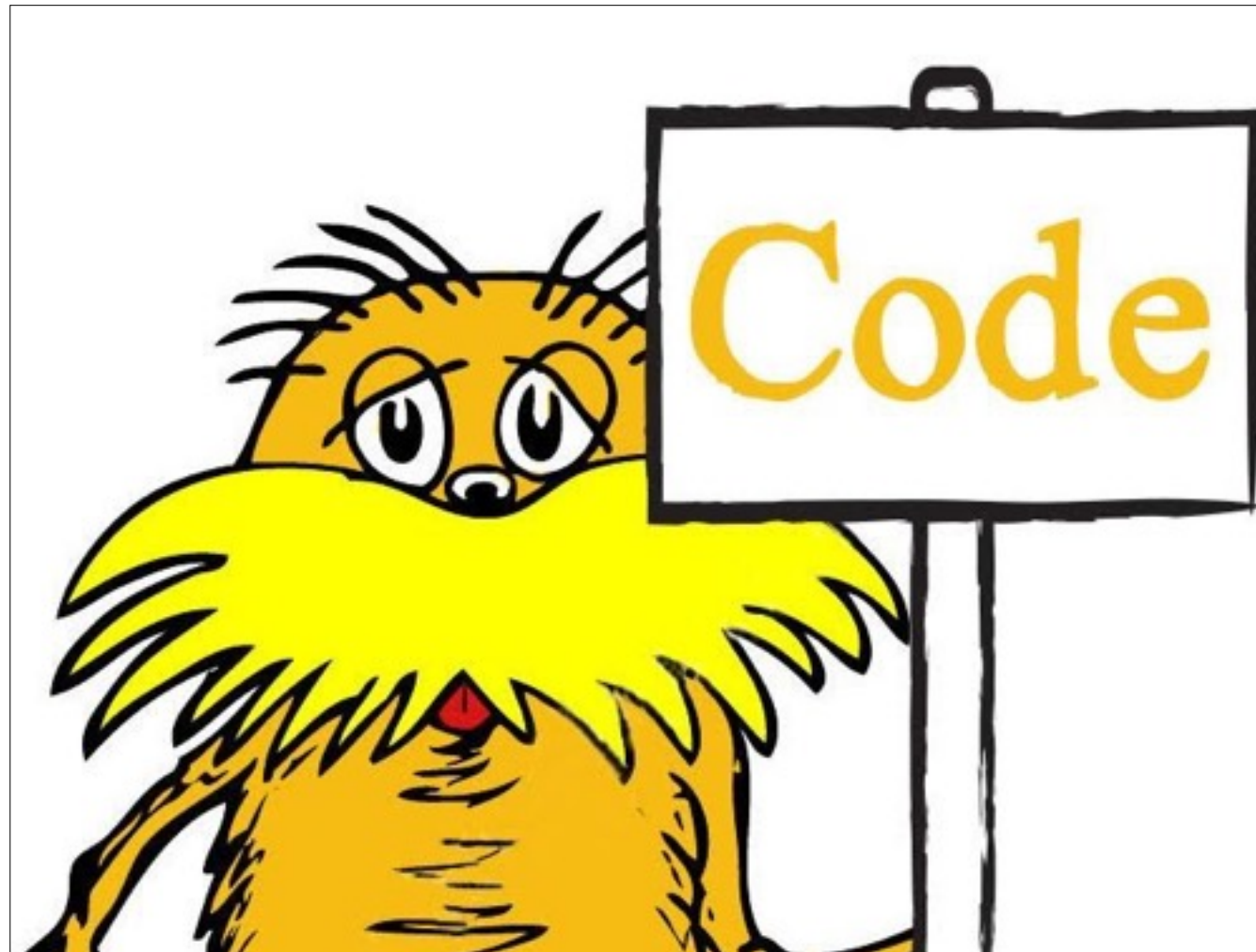
OVERCOME CODE CHALLENGES

We might reteam to overcome a challenge. These guys were a temporary, 2 week tiger team to resolve some performance issues for our product when it was in its infancy. They left the current teams they were on, came together for this challenge in this very room, solved the challenge, and then went back to their teams. We listened to what the code needed, and formed a team around it. What does your code need?

DEVELOP FRONT-END PATTERNS



This is an artistic rendition of one of our teams created by a visual designer on the team. They called themselves “Danger.” The team was formed by inviting team members out of other teams who had an interest in developing reusable front end patterns. They came together to start our pattern library for the rest of the teams to use. After accomplishing that mission, the team dissolved.



"I am the Lorax. I speak for the code." This guy is a character from the Dr. Seuss book called the Lorax. He speaks for the trees being cut down in the story. Here he is today saying, "pay attention to your code." What does your code need? Give it a voice. It might suggest reteaming.



“Reteaming is inevitable. You might as well get good at it.”

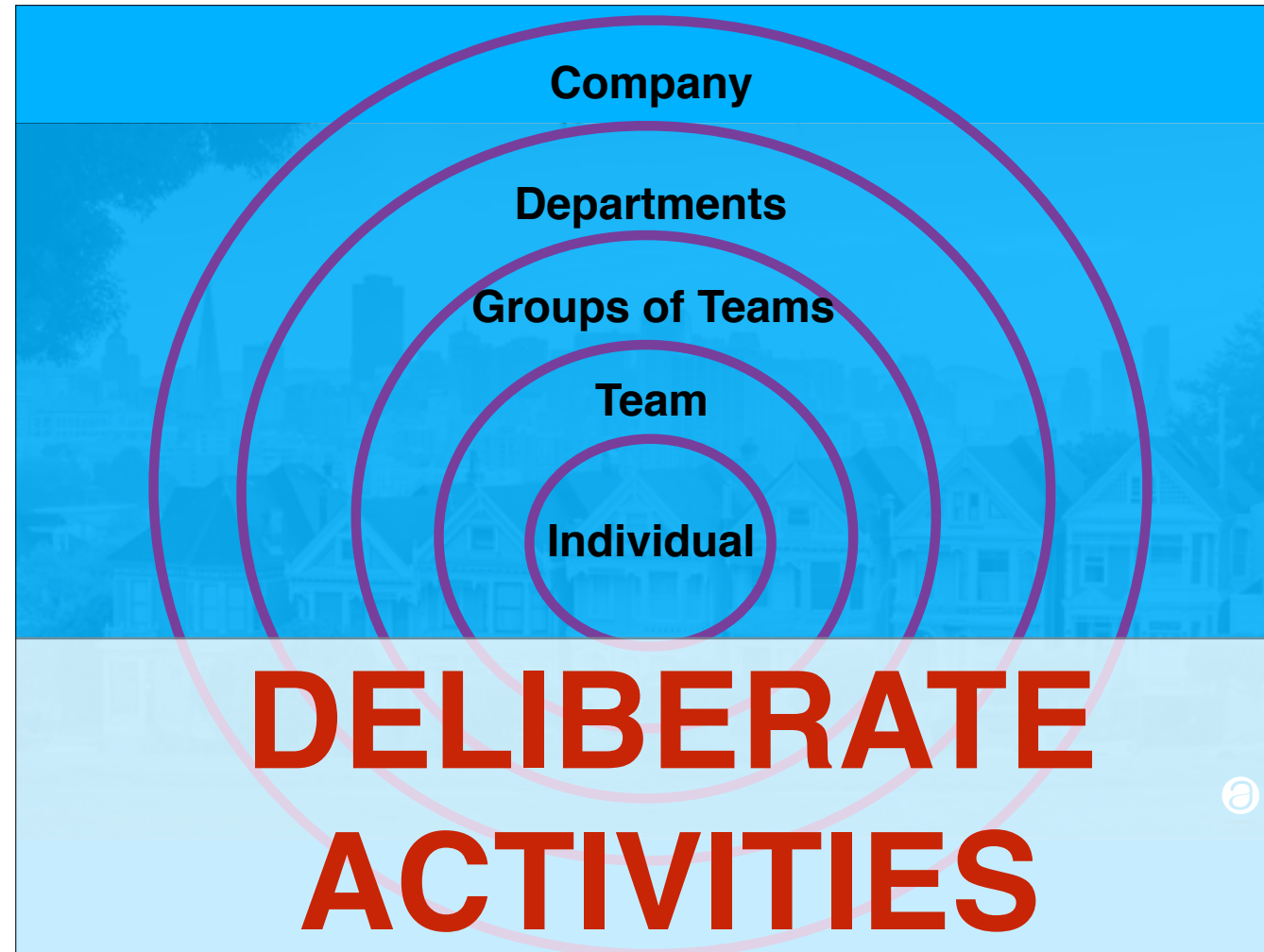
-Nayan Hajratwala[®]

The fact is, people will come and go from your company. You can do things deliberately to facilitate the reteaming. When one person leaves, they leave their official job role behind. We call this an “outer role” in Organizational Relationship Systems Coaching (ORSC). They also take with them the special things that they provided as a team member. Maybe they were the person who always cracked jokes in the room when things got difficult. Maybe they brought in the donuts on Fridays. Maybe they were the “glue person” who fostered equal communication on the team. Those types of things are their “inner roles”. When team members leave, we can do deliberate things to see if maybe other team members want to take on the “inner roles” that this person is taking away with them.

IDEAS TO MAKE RETEAMING EASIER

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You can do things across all of these levels in your company. Following are some examples.



ONE ON ONES

Fulfillment & Relationship

We tap into what people need by going on a lot of one on walks outside. Managers do this with people. Coaches do this with people. We do it for each other. It's called taking the time to get to know each other. "If you know and care about the people you work with, everything else comes easier." (there are deliberate ways to work on this, including: ramping up your listening and communication skills, getting to know the hobbies and interests of the people you work with, understanding the skills of people around you, what lights them up, what dims them, knowing their preferences for working and living together in the office, etc).

TEAM & SYSTEMIC RETROSPECTIVES



Teams can get along better when they talk about what it is like to work with each other, or how to improve special programs. Another feedback loop is to reflect beyond the level of the team. Here's a group of interviewers reflecting on how to improve that system. Other systems we improve like this include onboarding and mentorship.

CROSS-COMPANY RANDOM TEAM COMPETITION



We have several teams, and we get them to mix up and get to know each other via social events. This is a view of our annual guacamole making competition that we hold near Cinco day Mayo. We reteam randomly and people are all mixed up. They can develop new friendships and connections while working on a challenge.

ENG-PRODUCT OVERNIGHT RETREATS



We also take an annual overnight trip together. This helps people form bonds cross team as well. Here we were white water rafting. We've also gone camping on the channel islands and have gone to Disneyland.

CROSS-TEAM RETROS



We do cross team retrospectives too. We could do them at the “college” level (our clusters of teams).



Recently some of our teams went to the price is right. Outings help people get to know each other, and so later if they are on the same team, things are easier.

APPRECIATIONS



#excelsior ▾



Excelsior! BOT 12:12 PM

John Yoder appreciates Jim Herzberg:

Many thanks to Jim for helping to investigate and resolve the CI issues yesterday!

BOOM. 💪

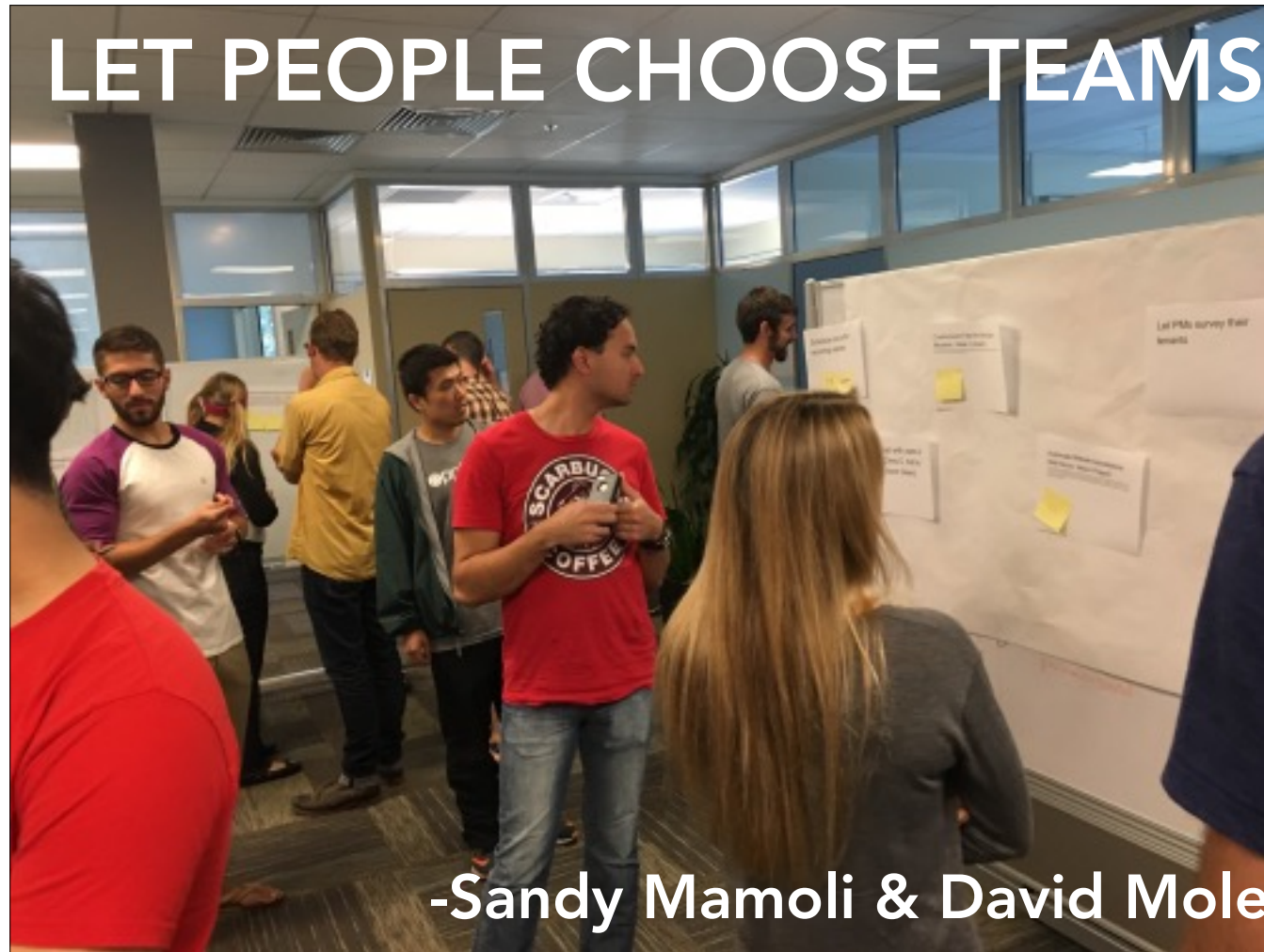


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We have an internal tool for giving and receiving appreciations, that sends slack messages to us. This has raised positivity and gives cross-team visibility to people.

LET PEOPLE CHOOSE TEAMS



I see and hear about a lot of manager-created teams. I've noticed when people have the freedom to create their own teams, that the energy and excitement is different. The picture here is from our self-selection event that we do for our 24 hour hack day. Sandy and David will talk about people-created teams in their talk which is right after this one, in this room.

SPEED UP THE GEL



You can also do deliberate team resets to accelerate team gel and to lower the cost of reteaming. You can do specific things to help people get to know each other, their skills, and derive with them how they want to be and work together on a team.

RULES FOR LIVING TOGETHER



When we reteam, we move to different desks. We work out the rules we want for our shared team spaces. We express the reteaming physically in this way. I've been able to move my desk stuff in 20 minutes!



If your teams are low energy, you might consider reteaming as a valid option.

Let Geek Joy Thrive



-Geek Joy coined by Mike (Geepaw) Hill

What we want are motivated and excited engineers. We want to tap into their essence to find what they love and are excited to do. As Mike (Geepaw) Hill would say, we don't want to dim their lights. We want to inspire geek joy.

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I'm collecting stories about reteaming for the book I'm writing. A draft will be available on my web site in the near future. If you have a story to tell about reteaming, I'd love to interview you here at the conference or at some other point. Please let me know. Also, I'm now an independent contractor and available for short term assignments especially related to helping teams thrive after reteamings and reorgs.