

# DYNAMIC RETEAMING

*AT FAST-GROWING COMPANIES*

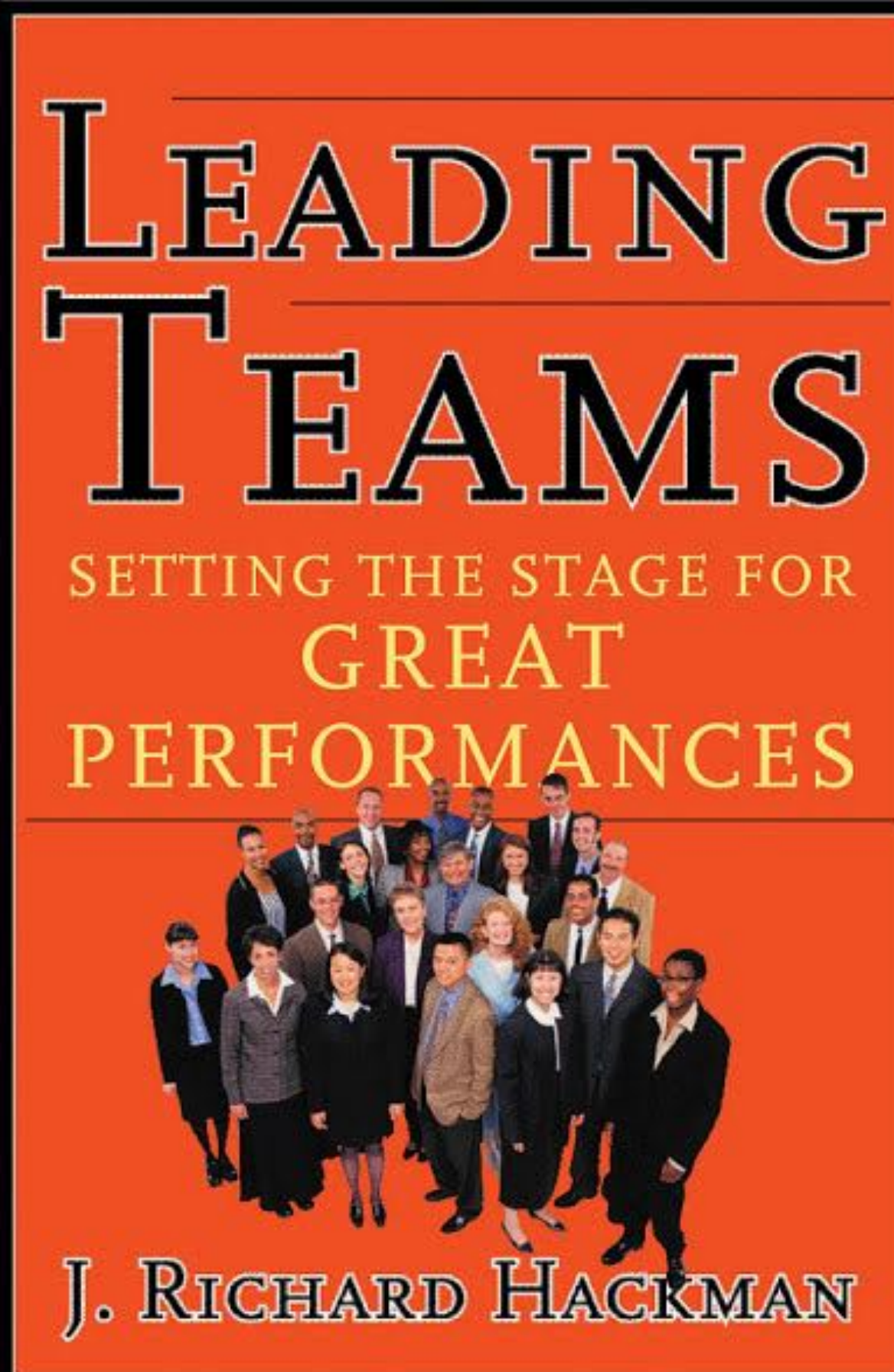


AGILE &  
BEYOND

HEIDI HELFAND

[heidihelfand.com](http://heidihelfand.com)

@heidihelfand



**“Teams with stable membership perform better than those that constantly have to deal with the arrival of new members and the departure of old ones.”**



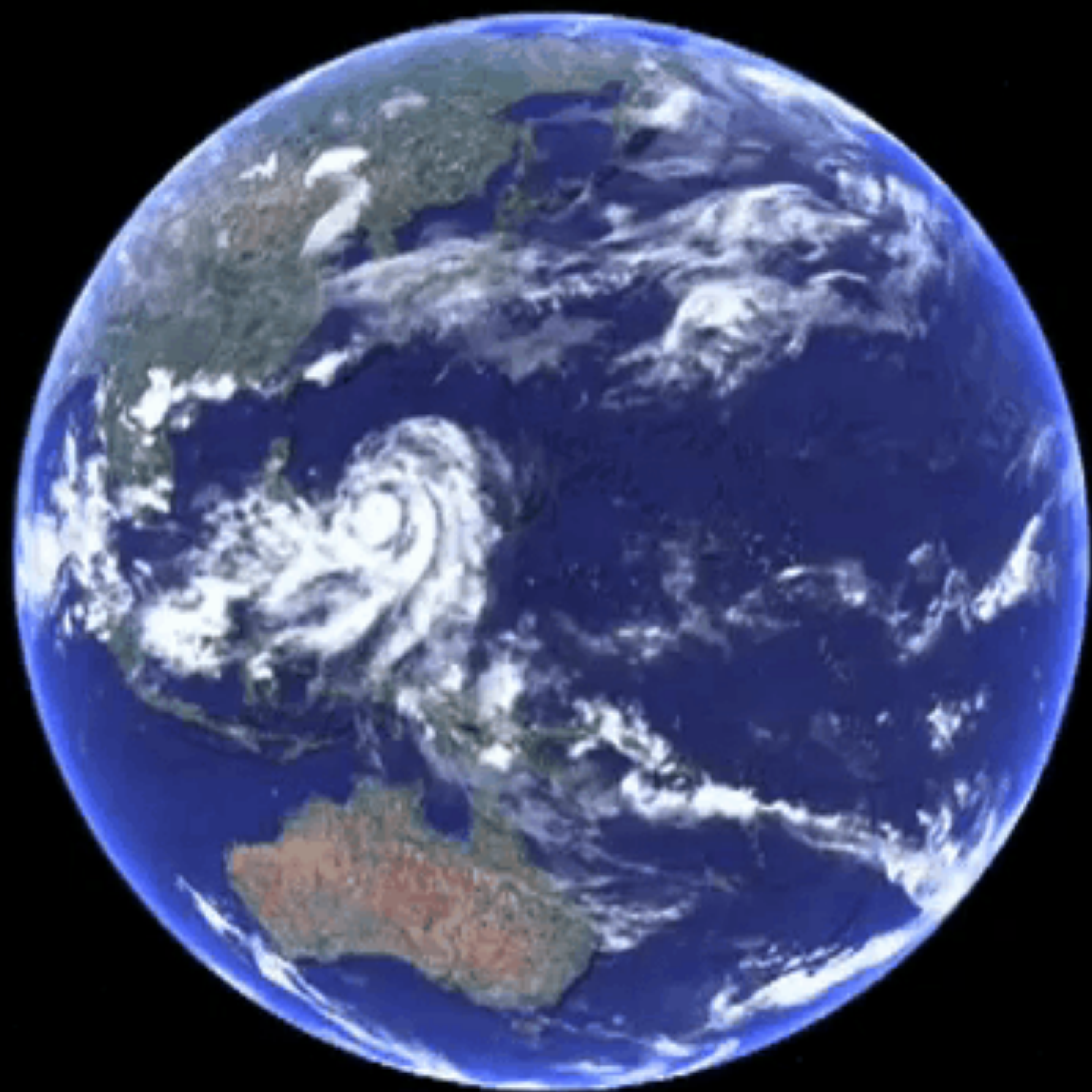
# KEEP TEAMS STABLE FOR PREDICTABILITY

## *-Scrum PLoP*



Kai Schreiber, Nao robot demo, Jaume University.







**DYNAMIC RETEAMING**  
**IS TEAM CHANGE.**

**STAND UP IF...**



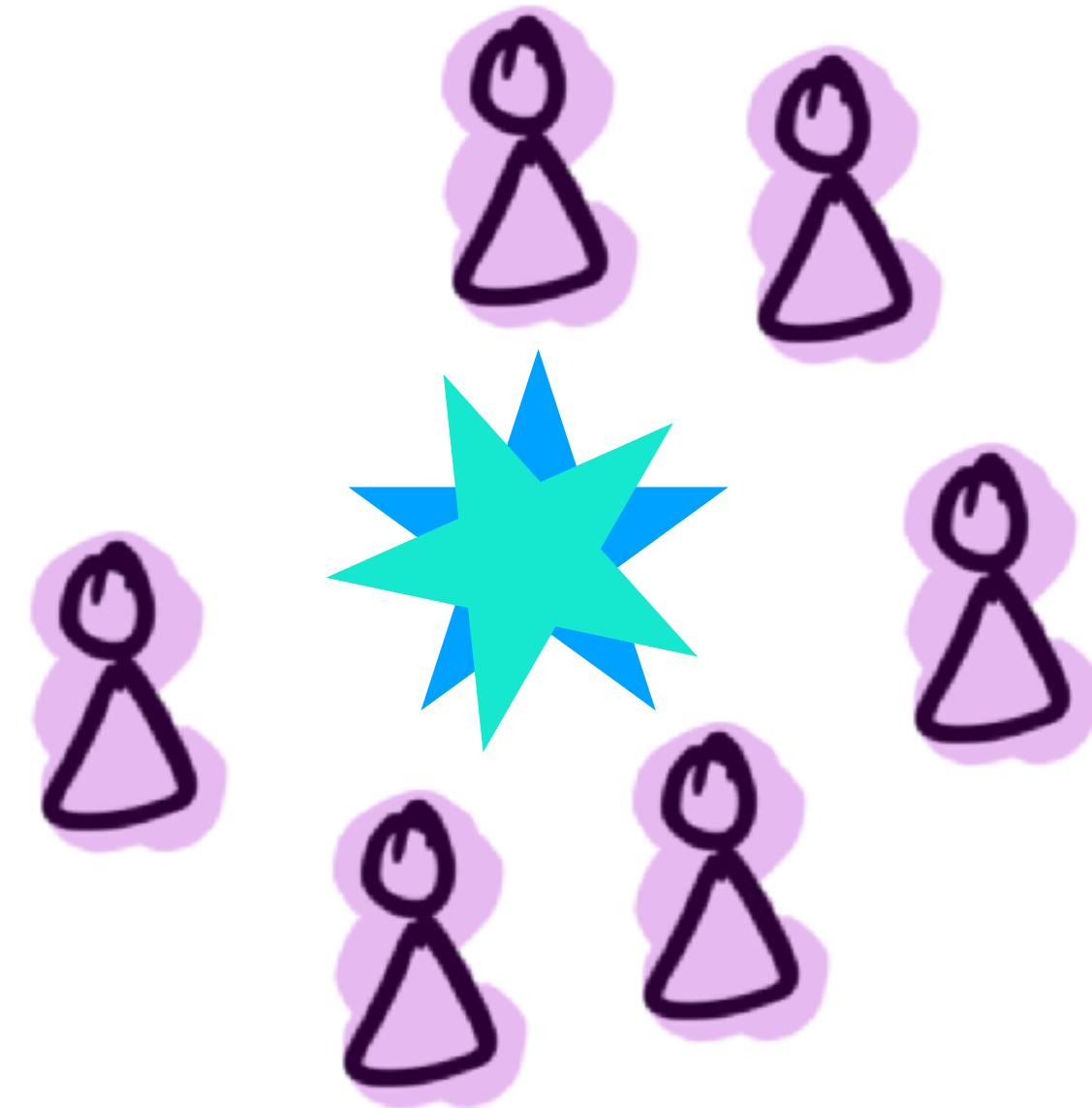
**TEAM CHANGE IS  
INEVITABLE.**

**GET GOOD AT IT.**

*-Nayan Hajratwala*

# ADD ONE PERSON = NEW TEAM

- **New ideas**
- **Differences**
- **Personality**
- **Wisdom**



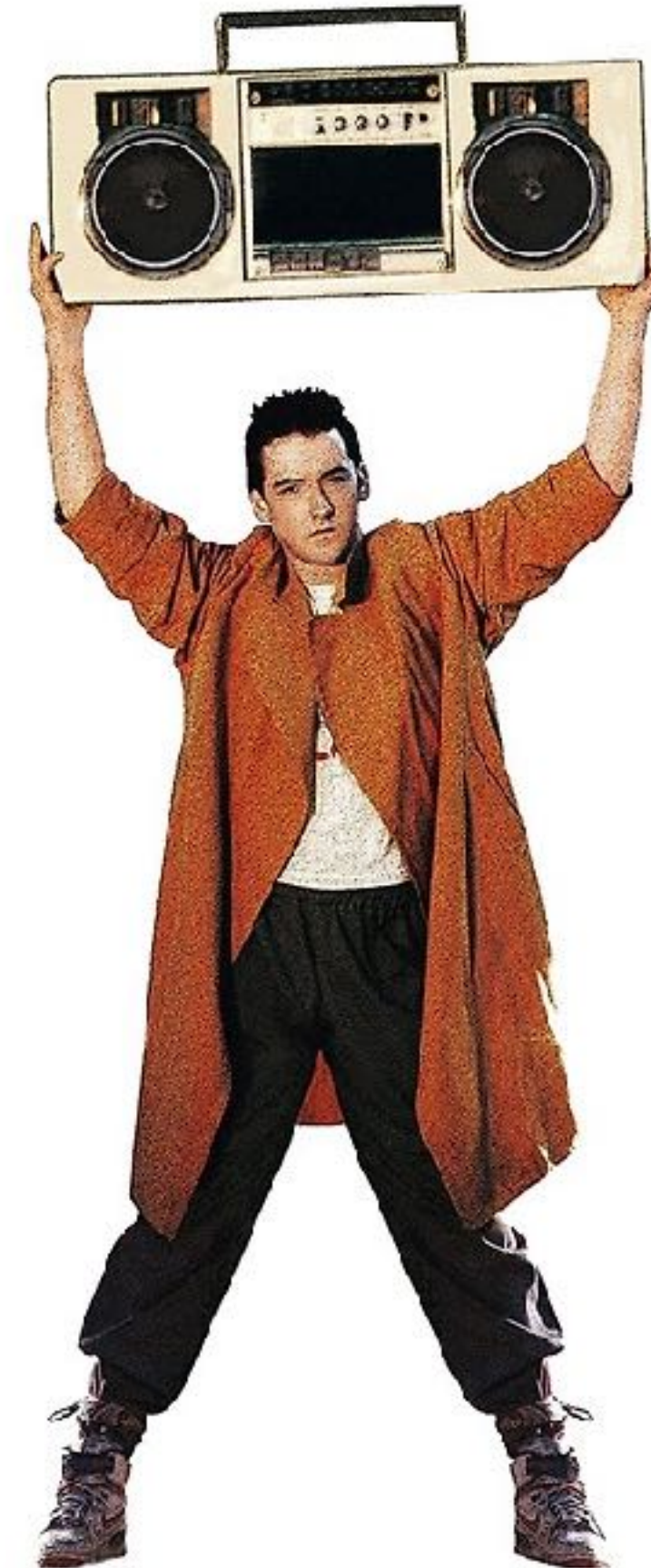


# ONE PERSON CHANGES THE DYNAMIC





# AMPLIFY TEAM CHANGE





# MULTIPLE PEOPLE START TOGETHER





**PROCORE®**









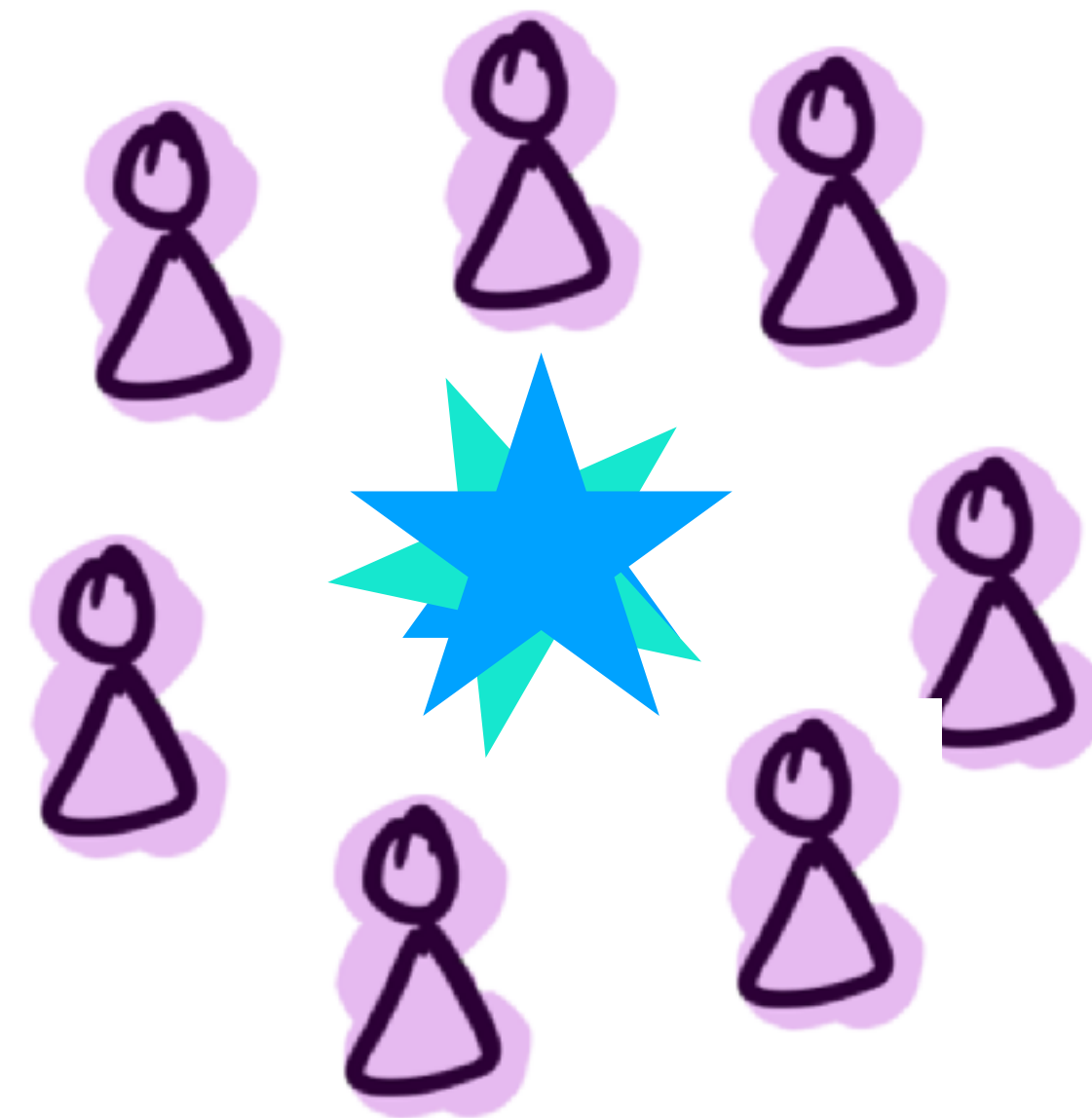
# BUSINESS DECISION





# LOSE ONE PERSON = NEW TEAM

- **Identity change**
- **Rename team**
- **What else leaves?**









# IT HURTS





**SOMETIMES WE'RE GLAD THEY'RE GONE**





# SOMETIMES MANY LEAVE



A white starburst shape with a black outline and a drop shadow, containing magenta text.

**Long running  
teams are the  
best!**

A white starburst shape with a black outline and a drop shadow, containing red text.

**Forming  
Storming  
Norming  
Performing!**

A white starburst shape with a black outline and a drop shadow, containing green text.

**Teams need  
time to gel!**

A white starburst shape with a black outline and a drop shadow, containing blue text.

**Keep  
teams the  
same!**

A white starburst shape with a black outline and a drop shadow, containing dark blue text.

**You'll lose  
predictability!**

A white starburst shape with a black outline and a drop shadow, containing orange text.

**Your  
velocity will  
go down!**



MacBook Pro

REALITY



**WHEN YOUR TEAMS  
CHANGE YOU ARE  
NOT “DOING IT  
WRONG”**



**FROM 15 TO 700**



**GoTo**Meeting



**GoTo**Webinar





**Acquired Expertcity -  
2003**

**\$225 million dollars.**



**Acquired Citrix  
GoToMeeting - 2017  
\$1.8 Billion.**



# FROM 10 TO 600





1 -33.08 \$49.70 -0.26 \$13.98 +1.98 2,101.48 -0

@ppfolio™



Nasdaq

APPF  
NasdaqListed



**FROM 800 TO 1200 to ?...**





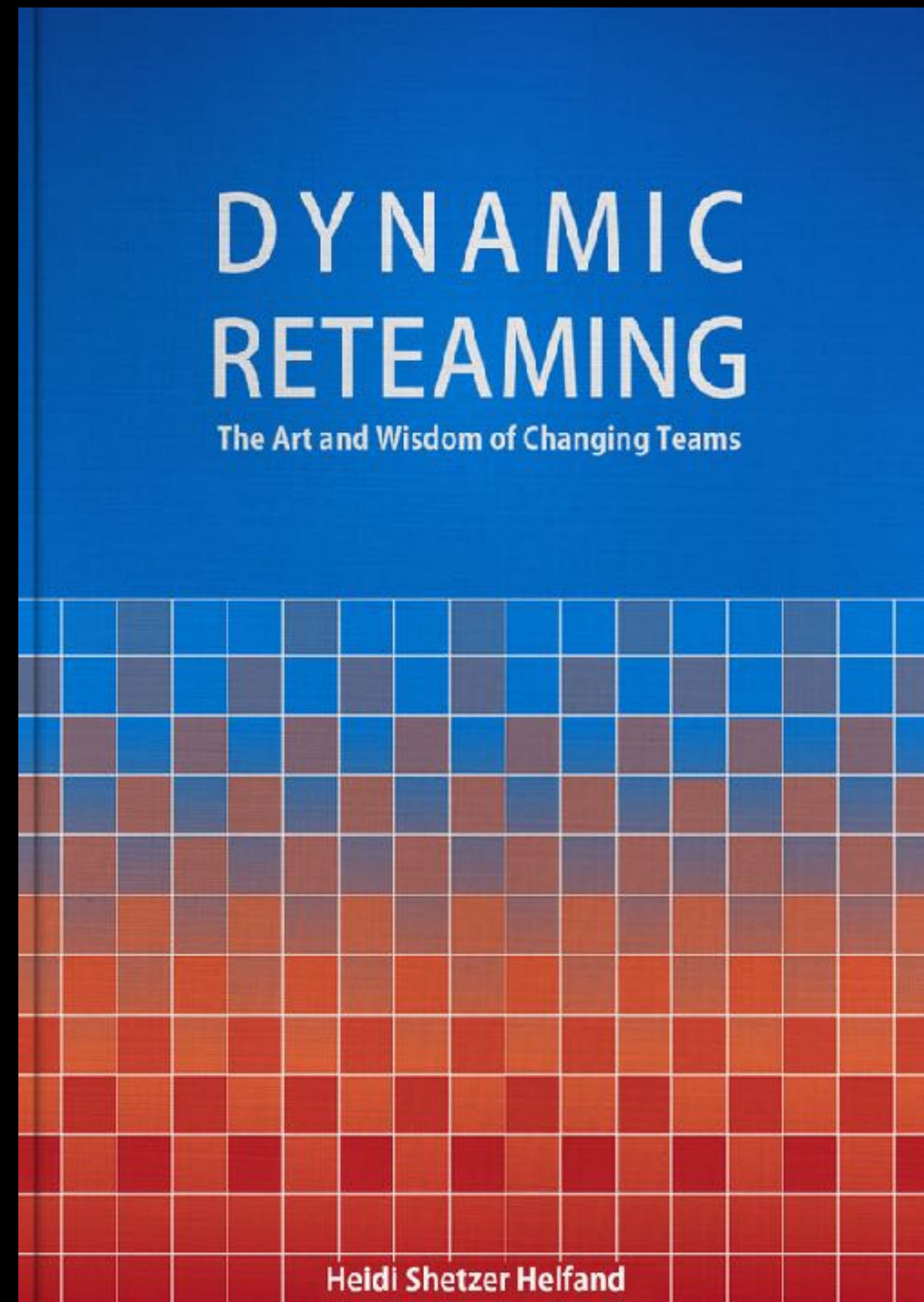
**HEIDI HELFAND**  
HEIDIHELFAND.COM @HEIDIHELFAND

**PROCORE®**





**LEANPUB.COM/  
DYNAMICRETEAMING**  
HEIDIHELFAND.COM @HEIDIHELFAND





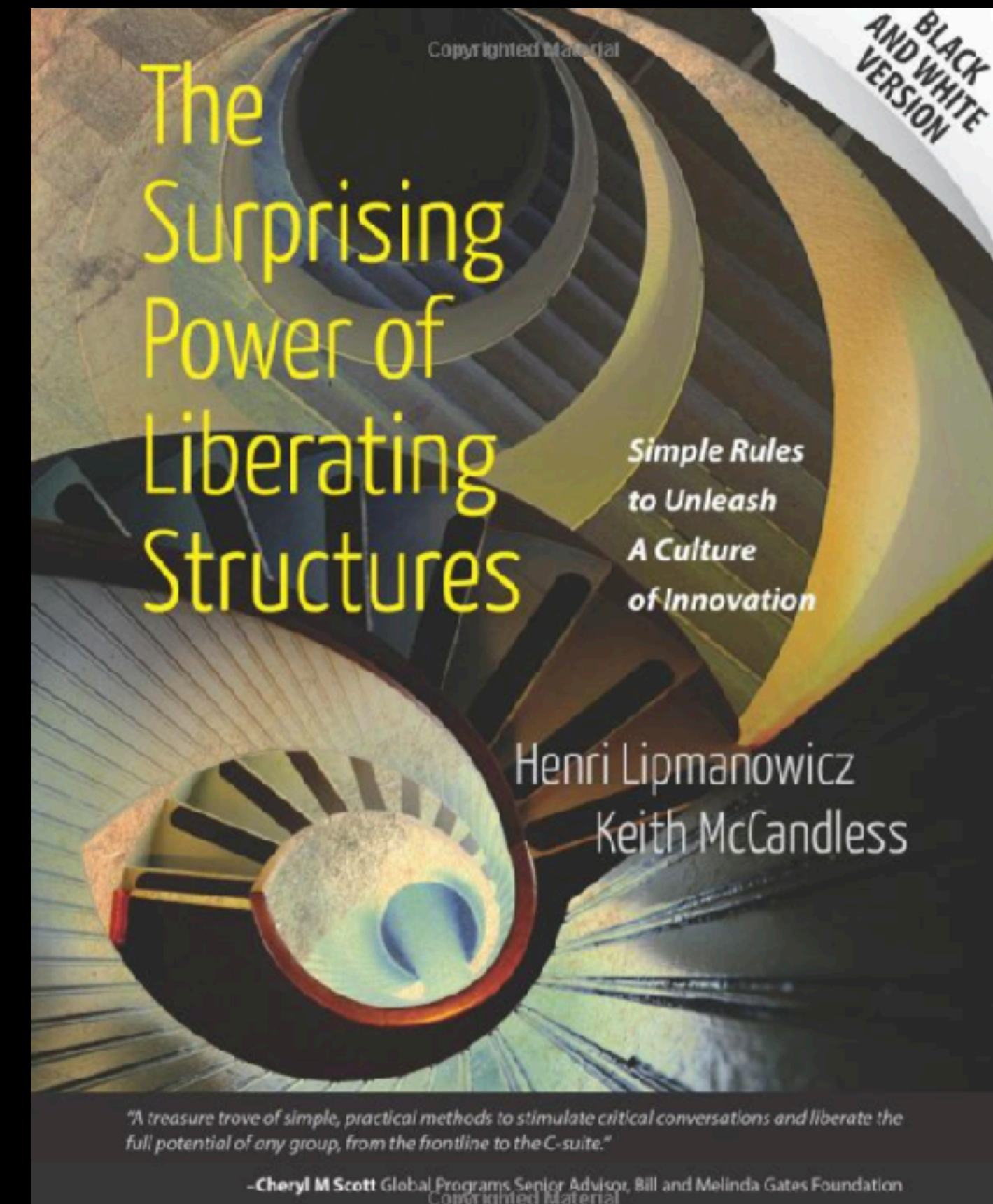
**LETS DIG IN**



**DYNAMIC  
RETEAMING IS WHEN  
YOU CHANGE YOUR  
TEAMS**



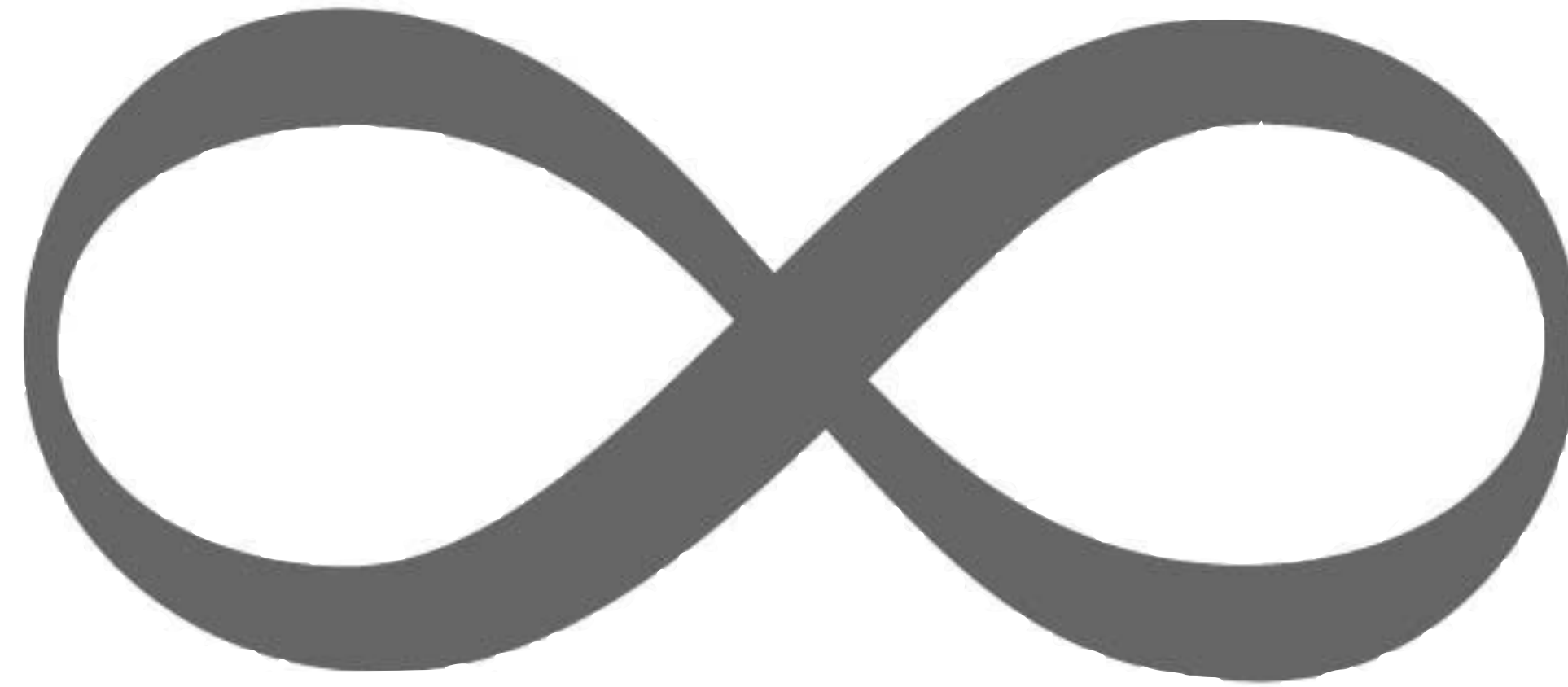
# UNDERSTAND CONTEXT WITH THE ECOCYCLE TOOL





# ECOCYCLE TOOL

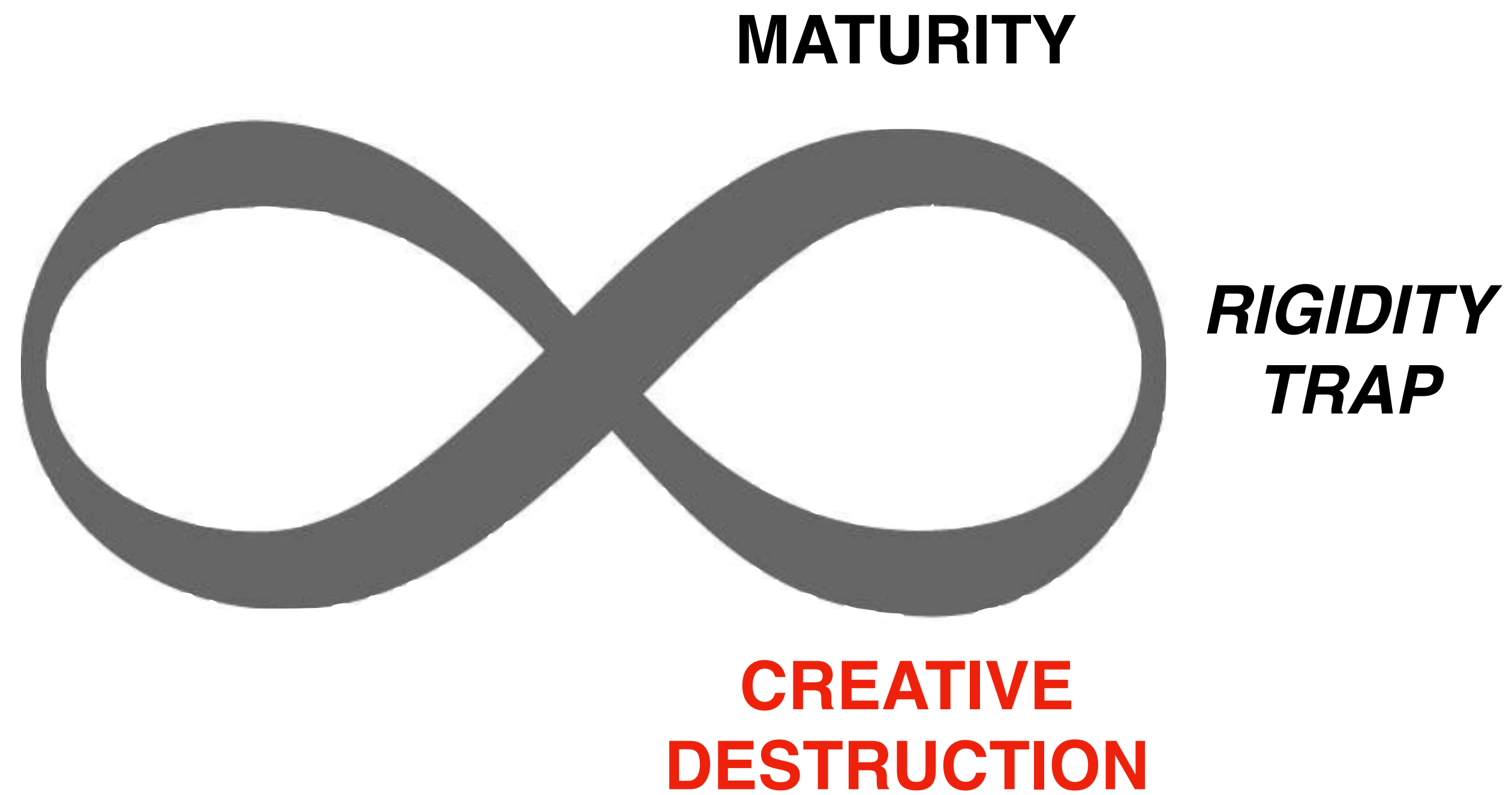
**MATURITY**



***RIGIDITY  
TRAP***

Adapted from Gunderson and Holling, 2003  
Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures





Adapted from Gunderson and Holling, 2003  
Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures

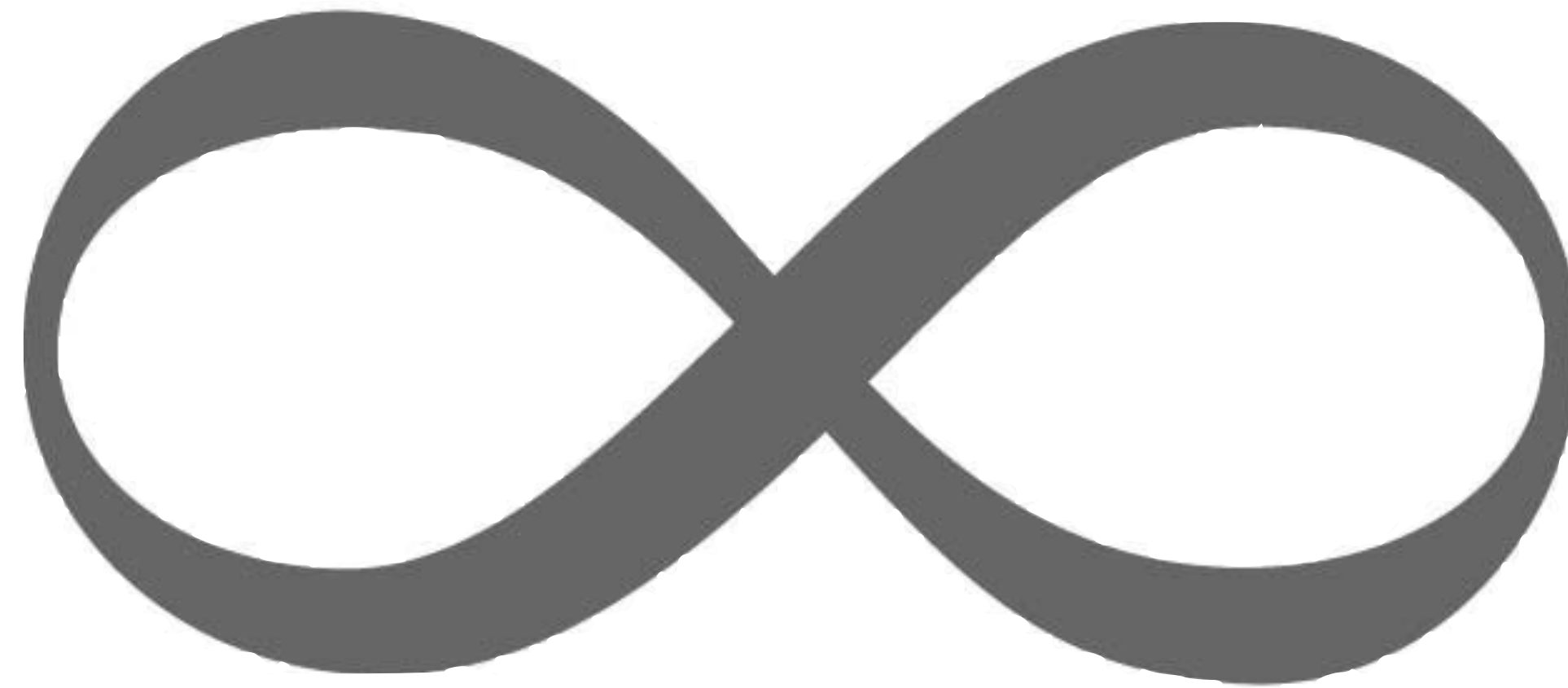








**MATURITY**

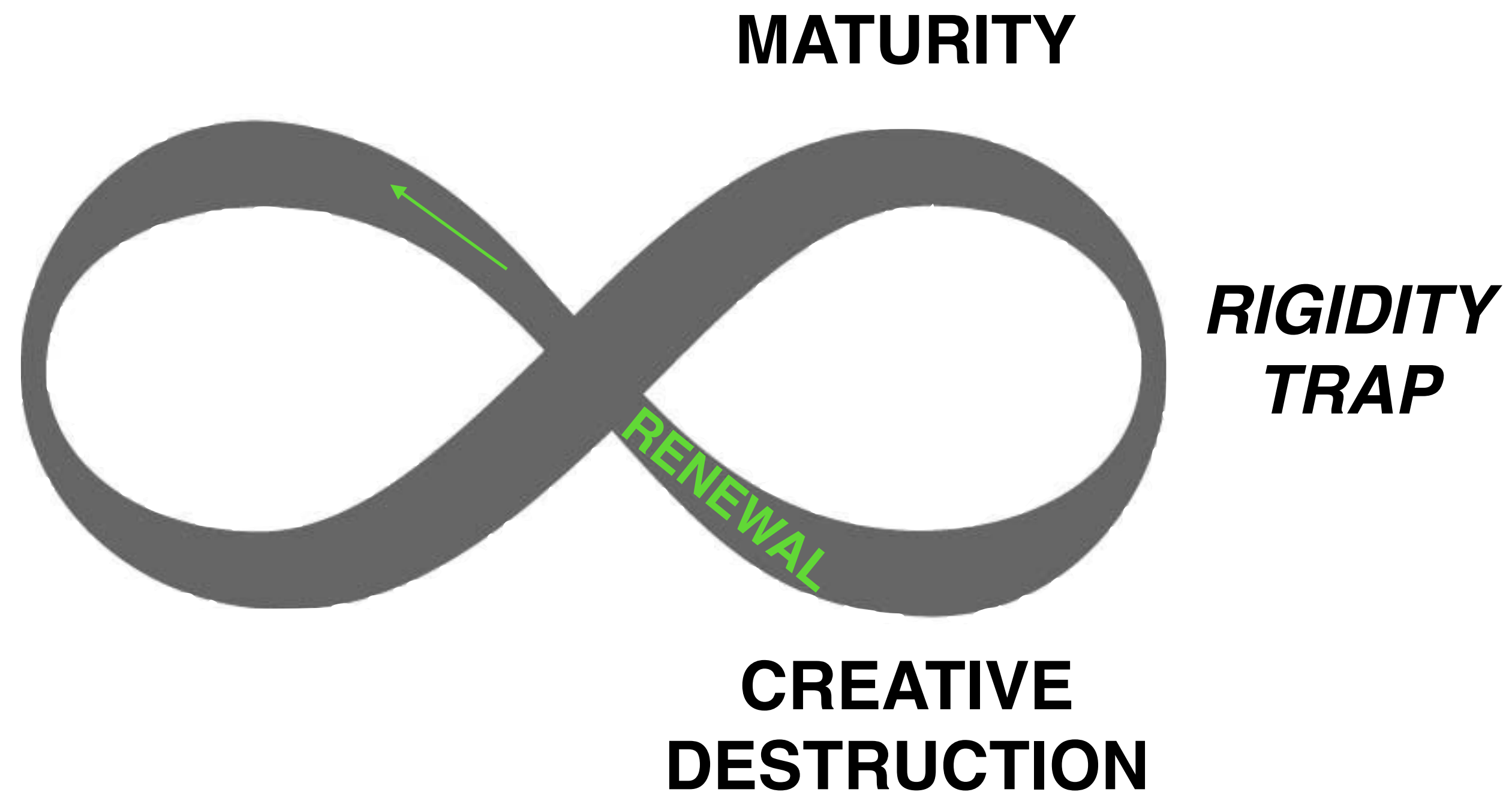


***RIGIDITY  
TRAP***

**CREATIVE  
DESTRUCTION**

Adapted from Gunderson and Holling, 2003  
Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures





Adapted from Gunderson and Holling, 2003  
Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures



**BIRTH**

**MATURITY**

***RIGIDITY  
TRAP***

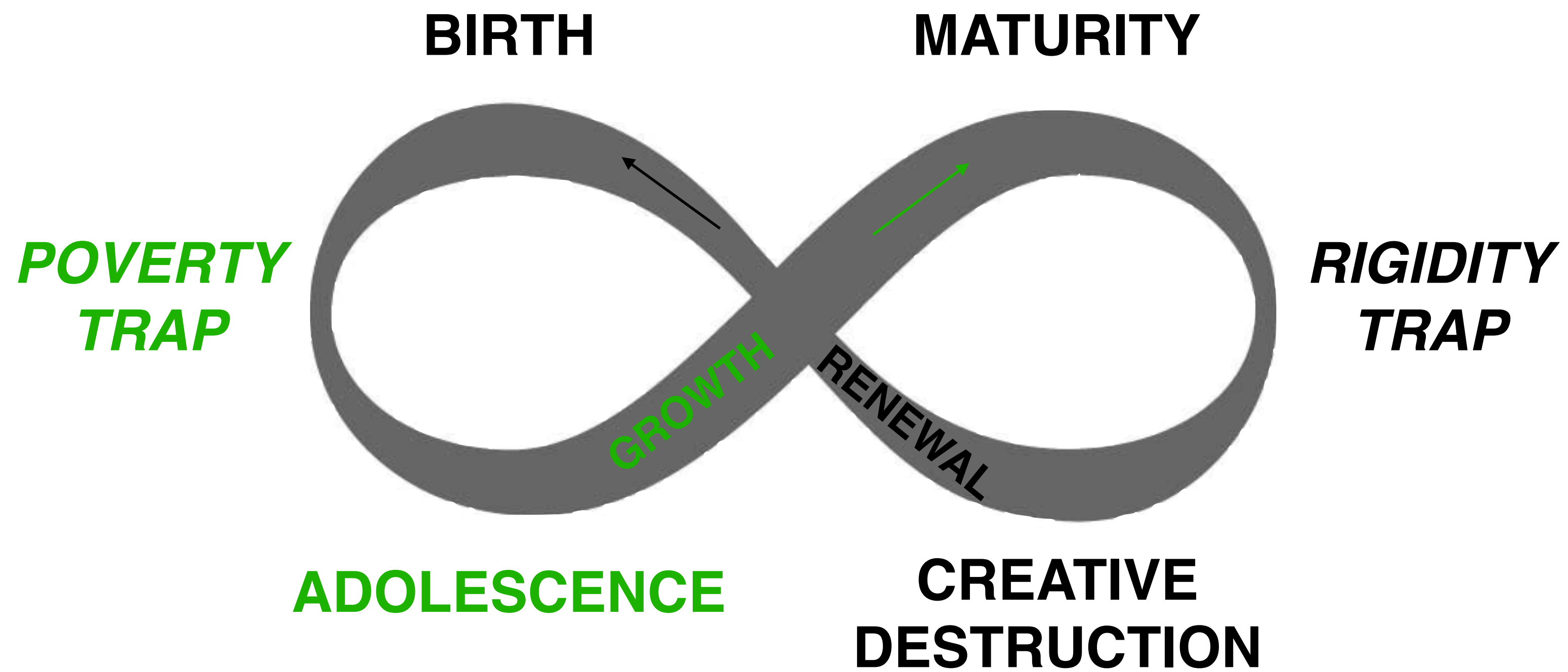
**RENEWAL**

**CREATIVE  
DESTRUCTION**



Adapted from Gunderson and Holling, 2003  
Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures





Adapted from Gunderson and Holling, 2003  
Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures

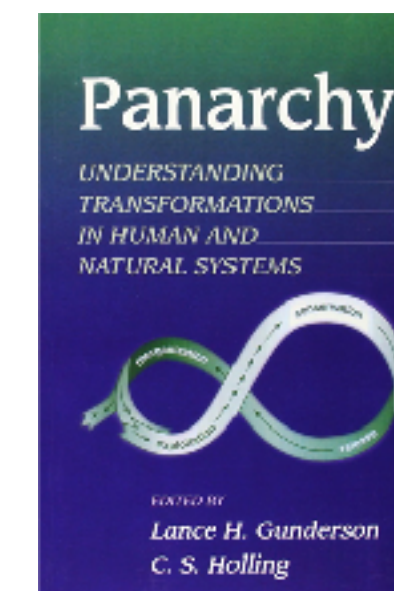
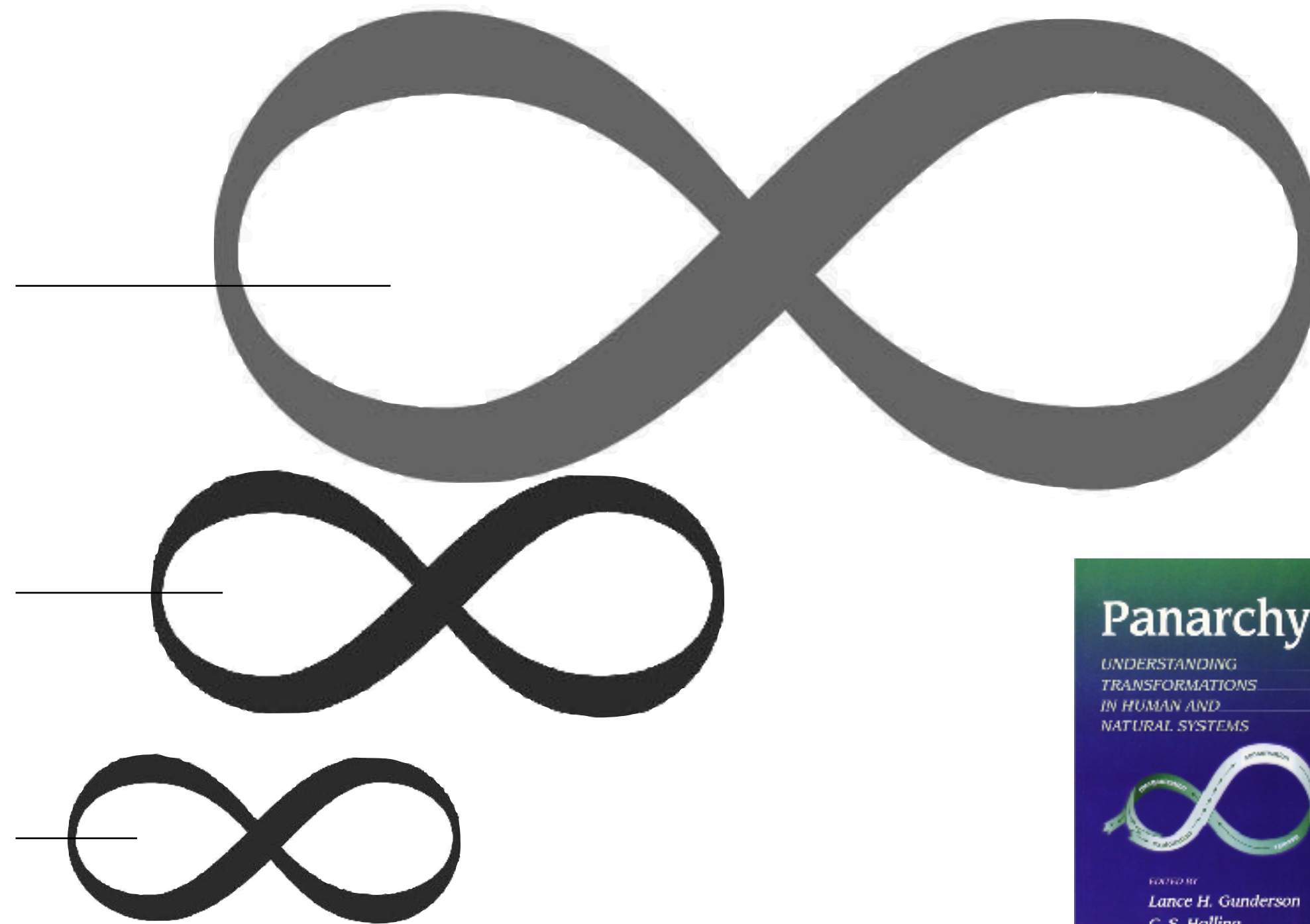


# MULTI-LEVEL

**Forest**

**Tree**

**Leaf**



Adapted from Gunderson and Holling, 2003  
Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures



**DYNAMIC  
RETEAMING IS MULTI  
DIMENSIONAL**



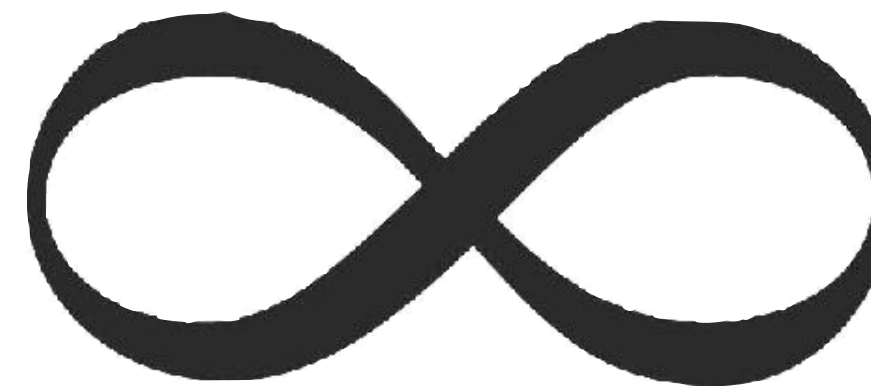
company



dept



tribe



team



person





**TO “DO” DYNAMIC  
RETEAMING**

**APPLY PATTERNS TO  
SOLVE PROBLEMS.**



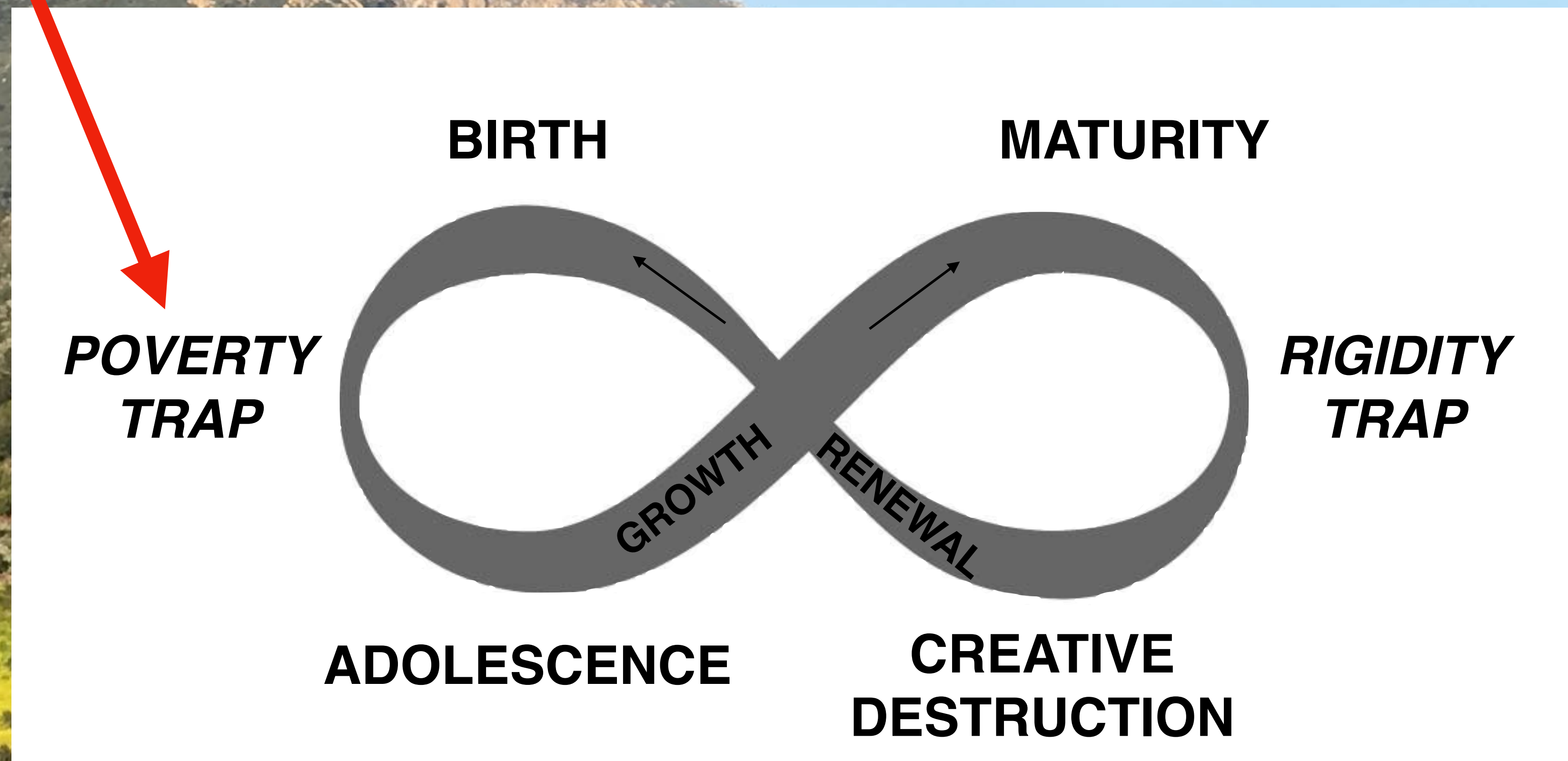
**PROBLEM:**

Poverty trap. Pivot or die.

**PATTERN:**

Innovation by Isolation





Adapted from Gunderson and Holling, 2003  
Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures



2000



FROM 15 TO 800



## Select an expert's bid

- Our experts have received your request and have up to 2 minutes to respond with bids...
- Use the pull-down menus on bids to select an expert or view their resume; send email or request a chat.

Bids close in:



Expert	Available	Bid Details
 <u>Melissa S.</u>  <b>1692 Sessions</b>	Now    	Mail merges are really quite simple once you've been shown properly by an expert. I'd be happy to show you... <b>\$10.00</b> <b>Est. 15 min</b> <div> <span>✓ Select Expert</span>  <span><b>View Resumé</b></span>  <span>Send Email</span>  <span>Request Chat</span> </div>
 <u>Cindy L.</u>  <b>1098 Sessions</b>	About 20 min  	I am MCSE and Brainb... adept at performing Ma... <b>\$5.00</b> <b>Est. 10 min</b> <div> <span>Select Expert</span> </div>
 <u>Josh S.</u> <b>New expert</b>	About 5 min  	I'm certified by Microsoft and can demonstrate that for you :-) 





Jonathan Rich  
Telephone  
Citra Rautava  
S. 10/10/10



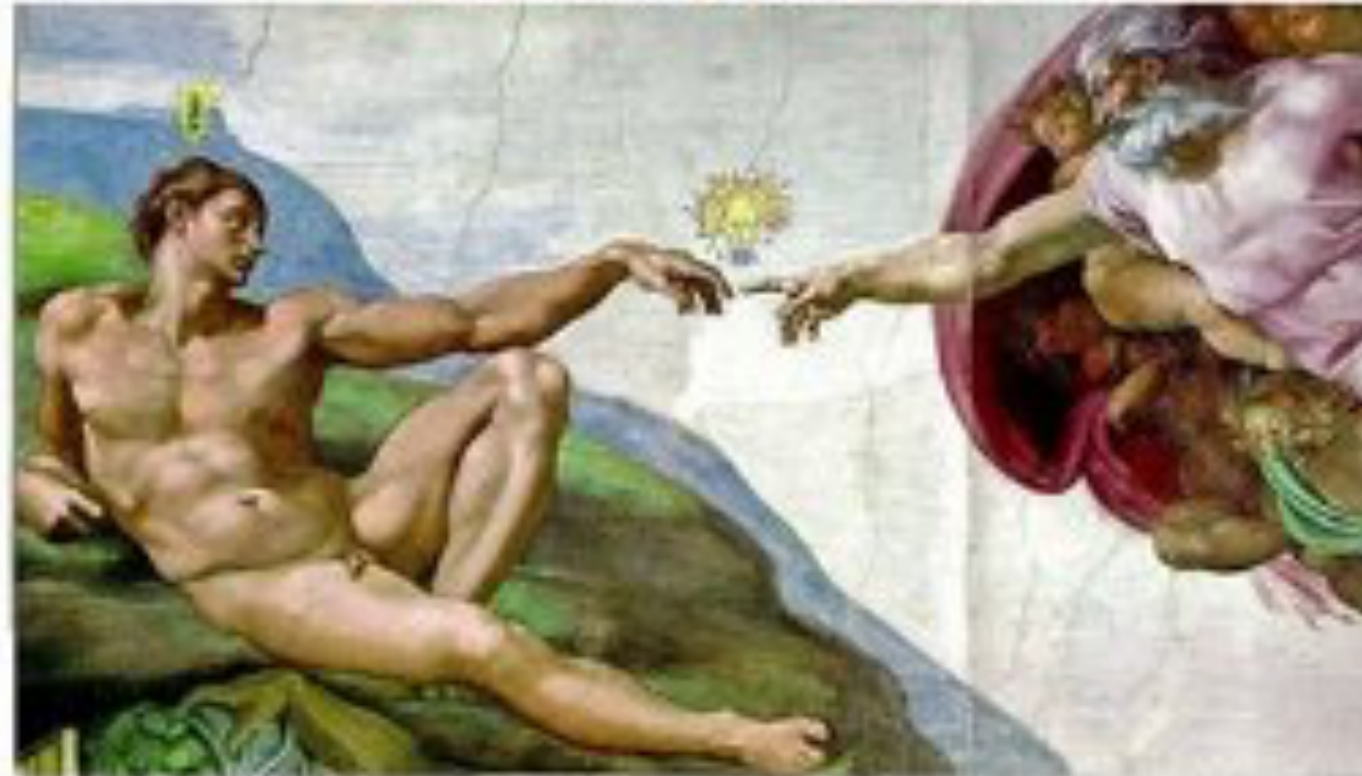
**“...People loved the screen-sharing...no one wanted to pay for tech support...the \$10 million lesson? **Do market validation!**”**

**-Klaus Schauer, Co-Founder & CTO**



# **The Four Steps to the Epiphany**

*Successful Strategies for  
Products that Win*



**Steven Gary Blank**

# **THE STARTUP OWNER'S MANUAL**

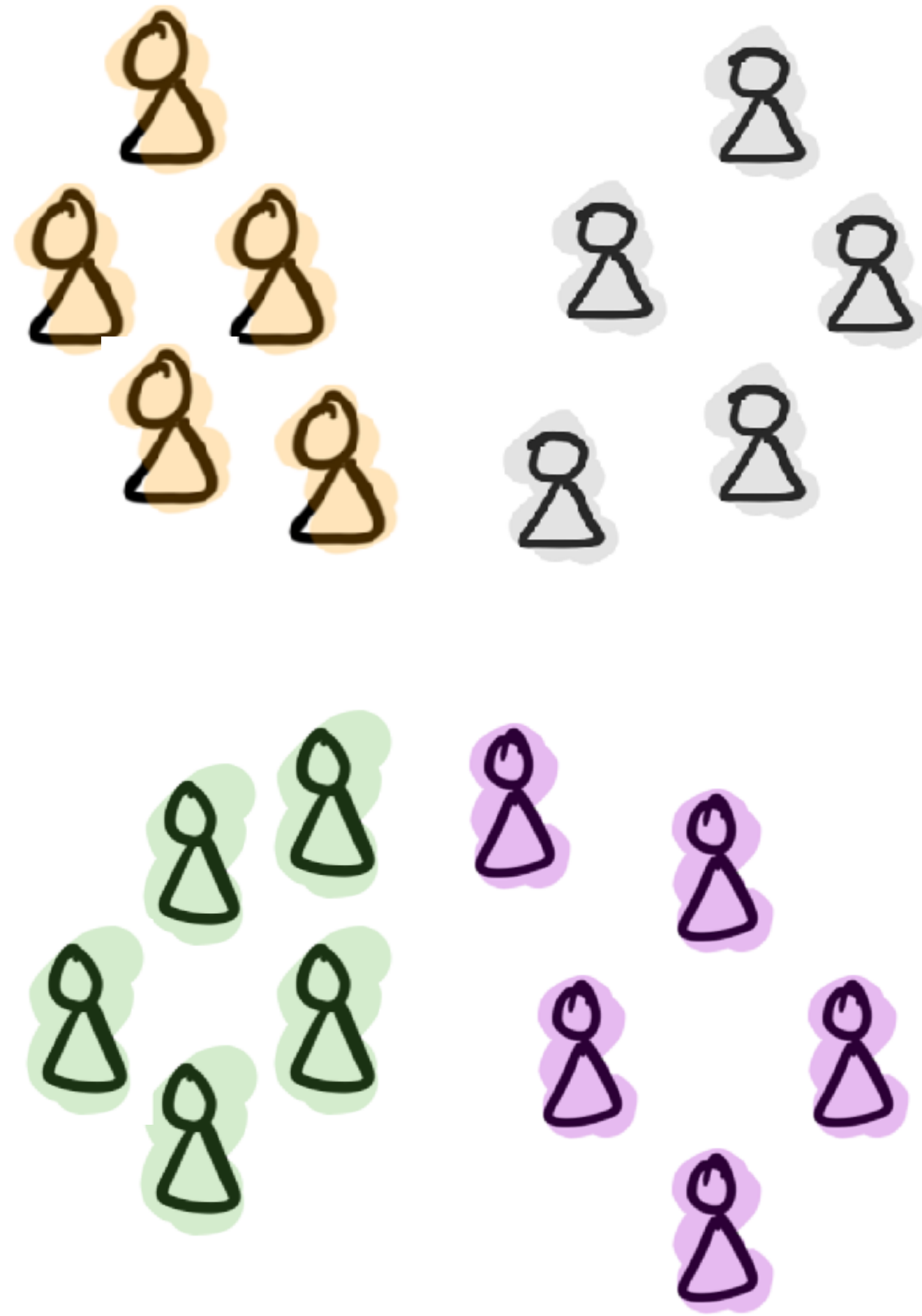
The Step-by-Step Guide for  
Building a Great Company



Steve Blank and Bob Dorf



# INNOVATION BY ISOLATION PATTERN



- **Form team**
- **Isolate team**
- **Give process freedom**
- **(Dissolve)**



GoToMyPC®





# INNOVATION BY ISOLATION PATTERN

**BIRTH**

**MATURITY**

**Great for Crisis Management**

**ADOLESCENCE**

**CREATIVE  
DESTRUCTION**

GROW

RENEWAL

Adapted from Gunderson and Holling, 2003

Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures



**PROBLEM:**

Mandate to grow/double

**PATTERN:**

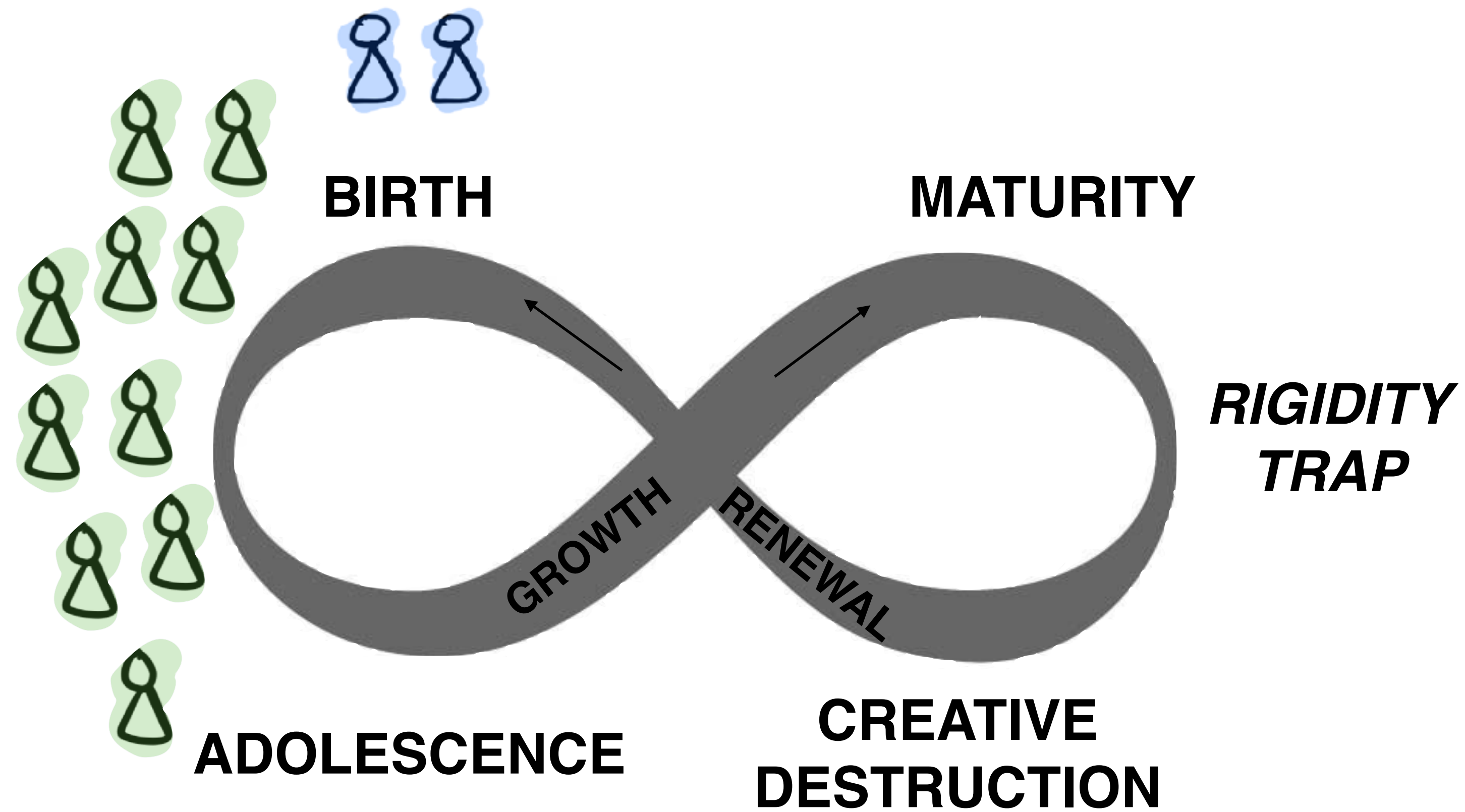
One by one & batch  
addition







# ONE BY ONE PATTERN





# FROM 10 TO 600





**MENTORS ARE THE FIRST PAIR**





# PAIRING, SWITCHING, TDD





# WE GREW



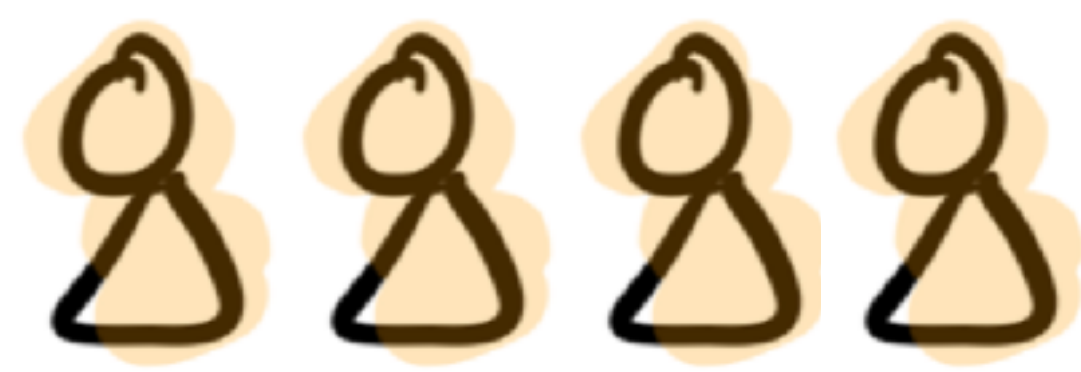


# MULTIPLES ARRIVED





# BATCH ADDITION PATTERN





# MENTOR & NEW HIRE RETROS





**PROBLEM:**

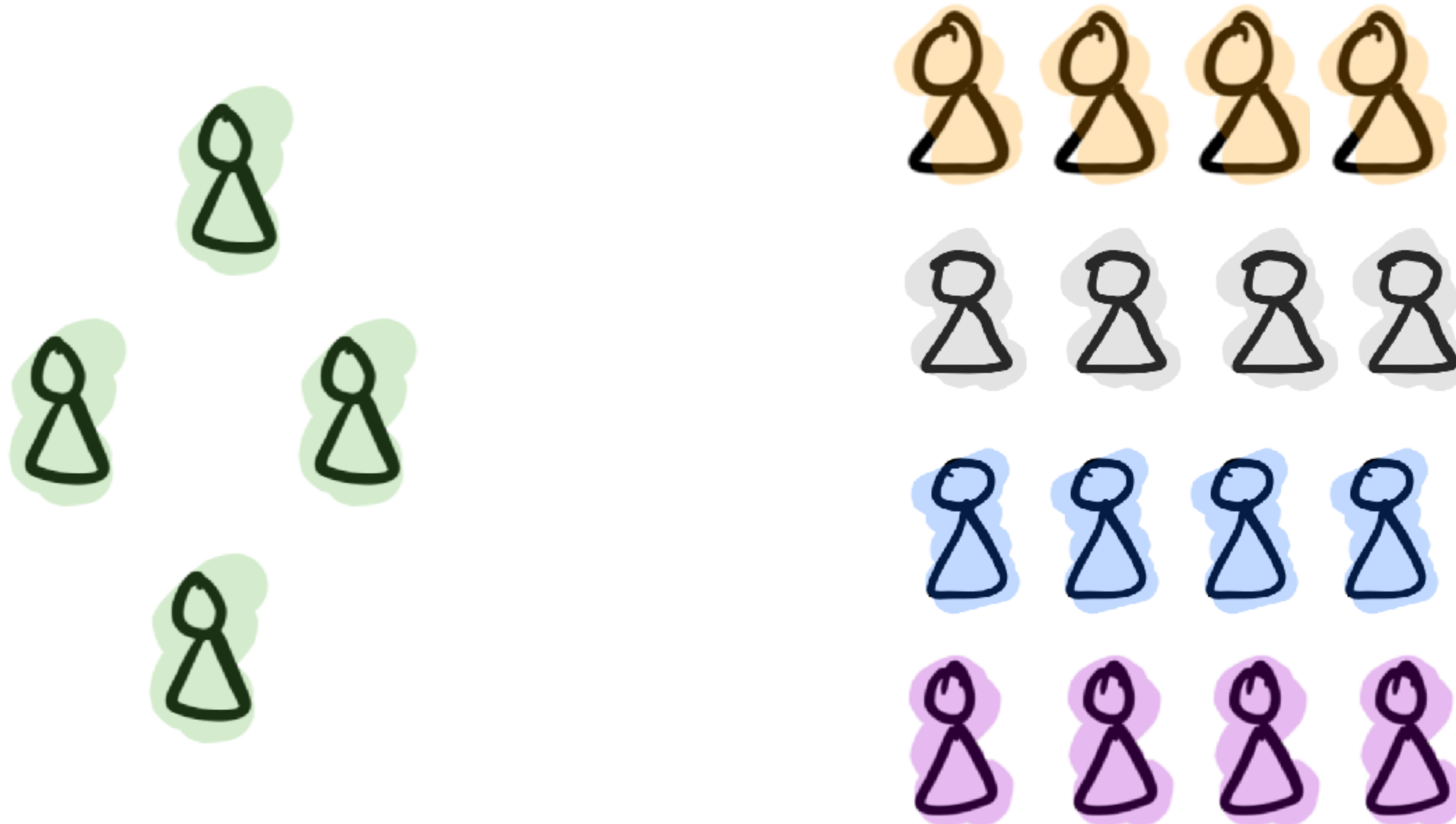
**Duplication of mentor effort**

**PATTERN:**

**Bootcamp pattern**



# BOOTCAMP PATTERN





## **PROBLEM:**

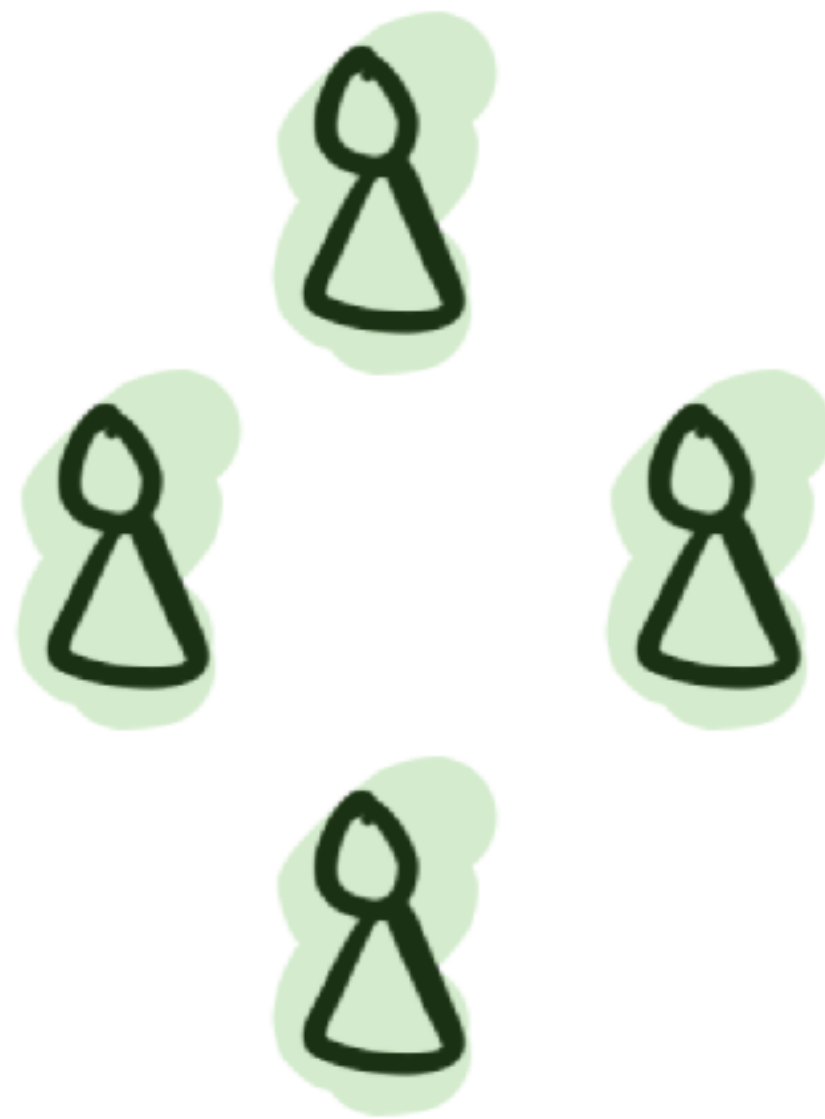
**Relationships limited to  
teams**

## **PATTERN:**

**Network formation**

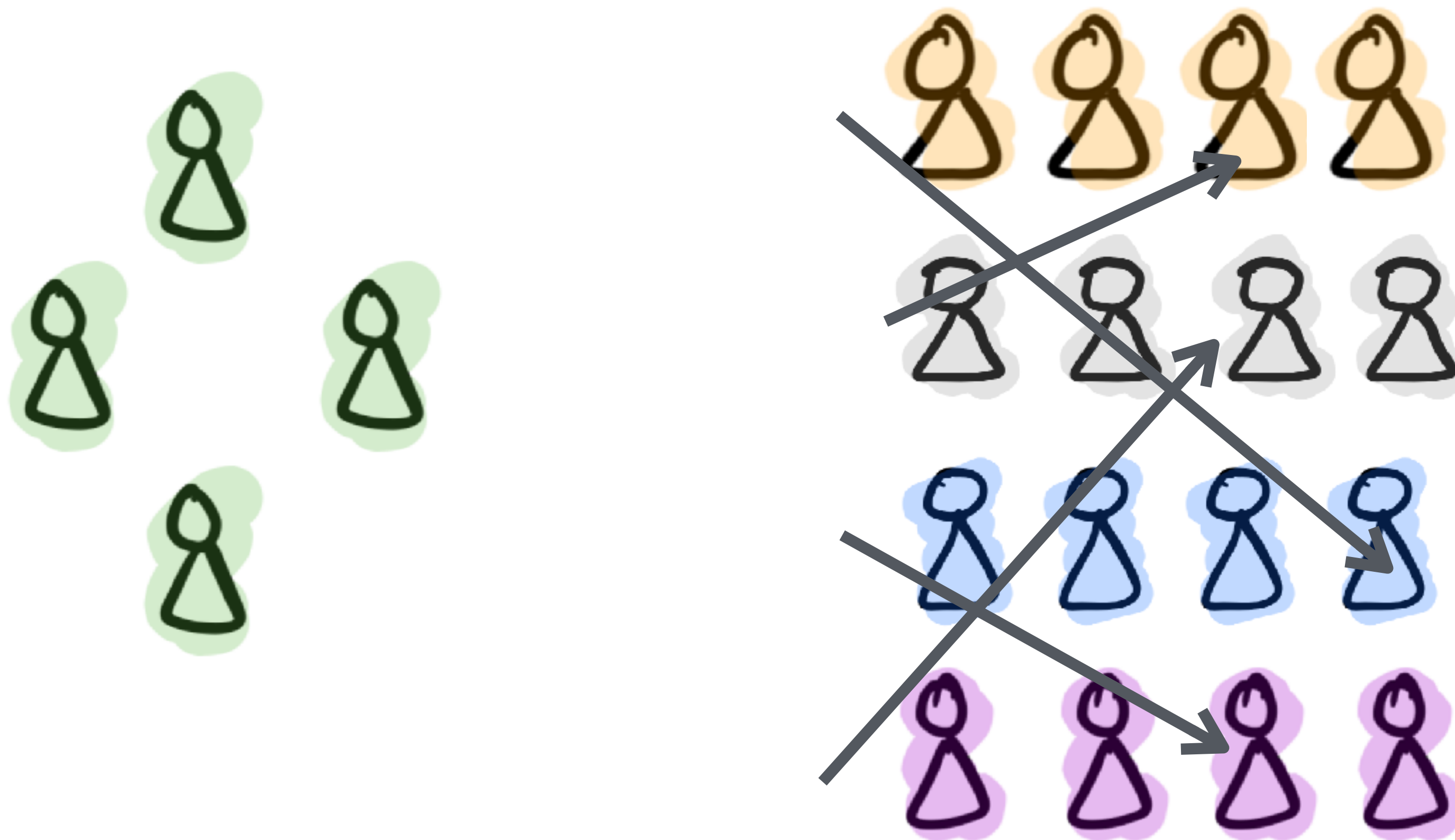


# BRING PEOPLE TO THEM





# NETWORKS FORMED





**PROBLEM:**

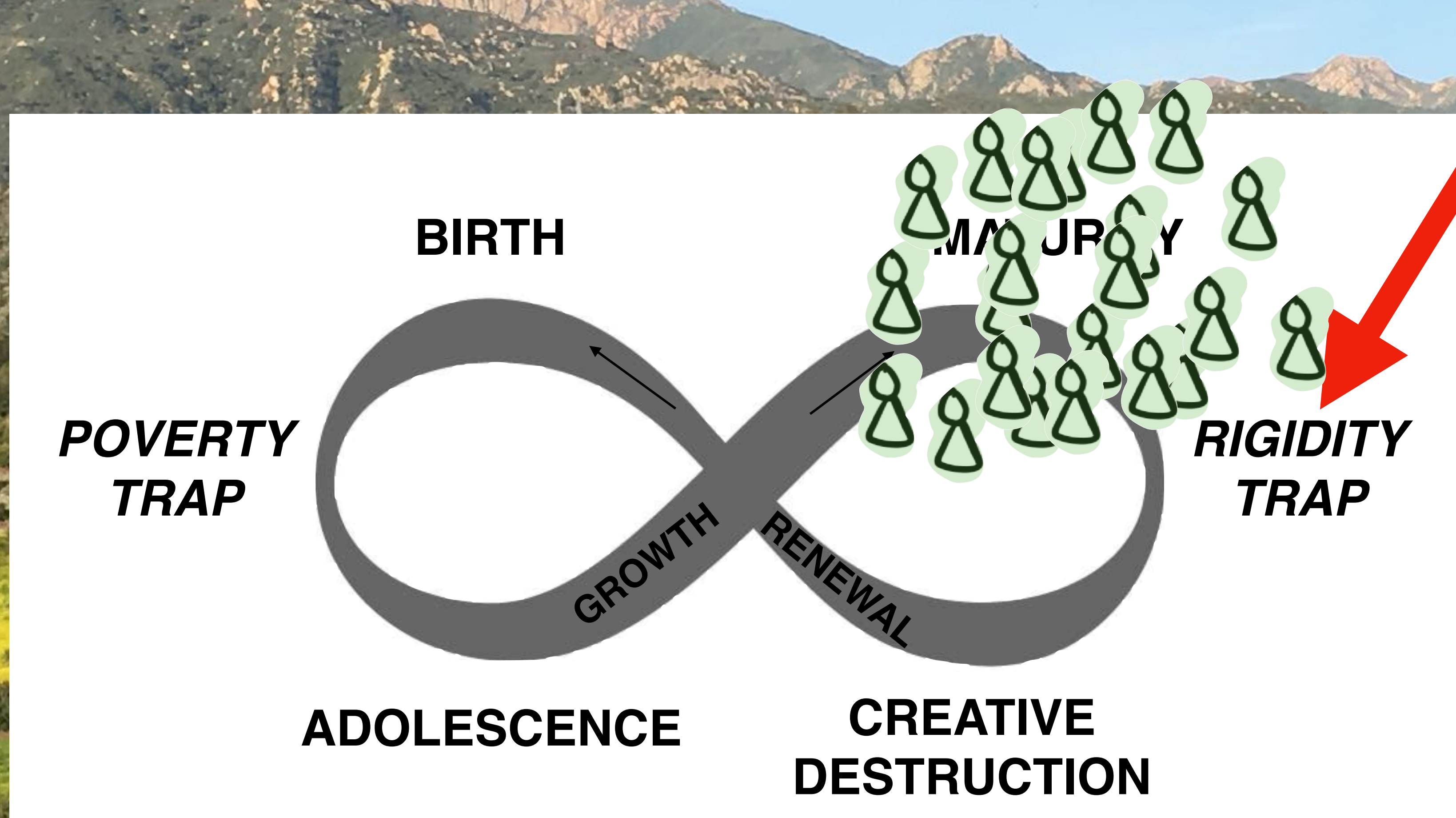
**Team-level rigidity traps**

**PATTERN:**

**Grow & split**



# WHEN TEAMS GROW “BIG”



Adapted from Gunderson and Holling, 2003  
Keith McCandless & Fisher Qua, Liberating Structures



**IT CAN FEEL UNPRODUCTIVE**



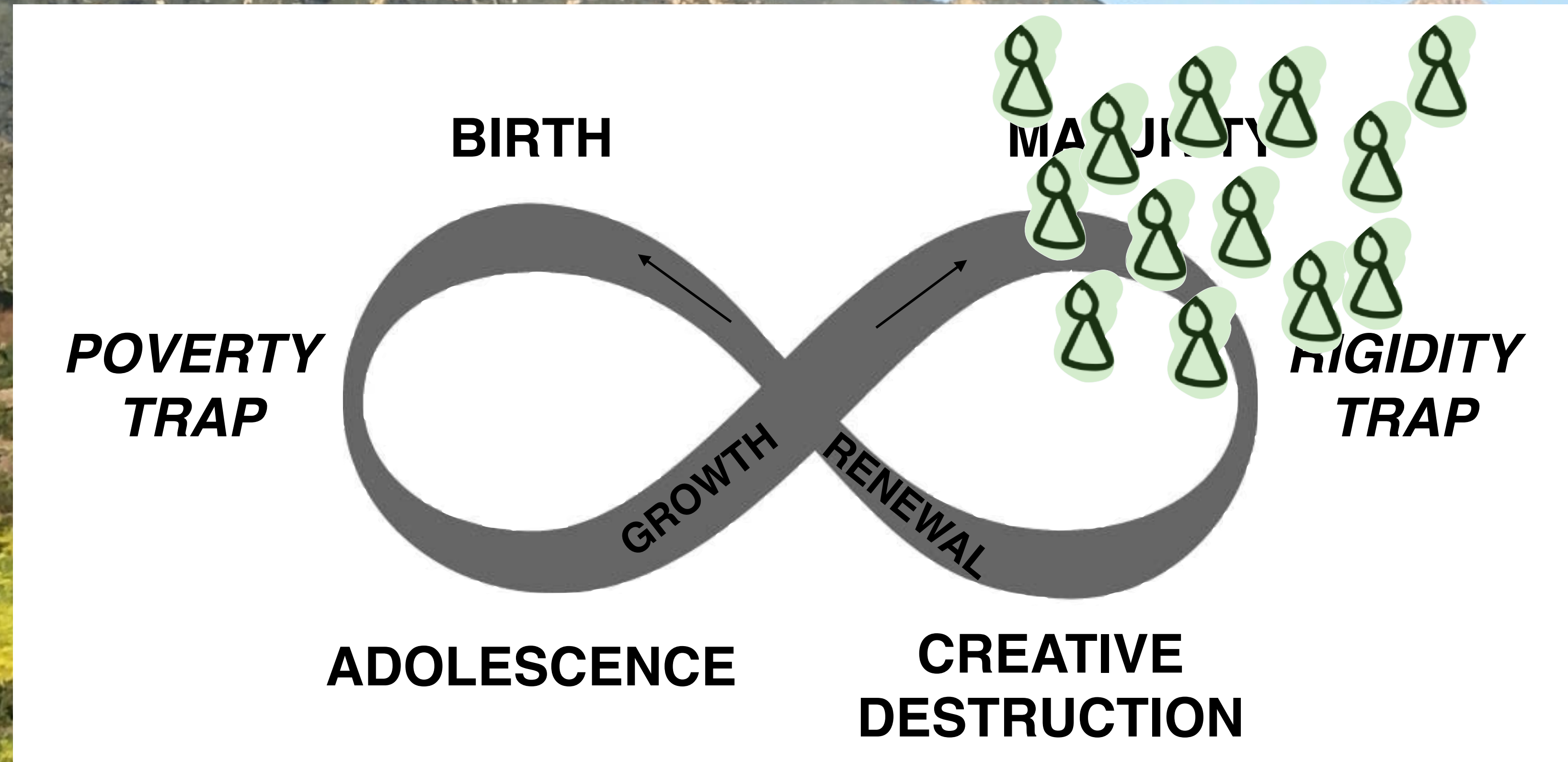


# **WATCH FOR THE SIGNS**

- **Planning takes forever.**
- **It's harder to make decisions.**
- **Work within team becomes unrelated.**
- **It just feels too big.**



# GROW AND SPLIT PATTERN



Adapted from Gunderson and Holling, 2003  
Keith McCandless & Fisher Qua, Liberating Structures



# TEAM IDENTITY







**UNRULY**



**Why does this happen?**



# The Scrum Guide™

---

The Definitive Guide to Scrum:  
The Rules of the Game

*November 2017*



*Jeff Sutherland*

*Ken Schwaber*

*Developed and sustained by Scrum creators: Ken Schwaber and Jeff Sutherland*

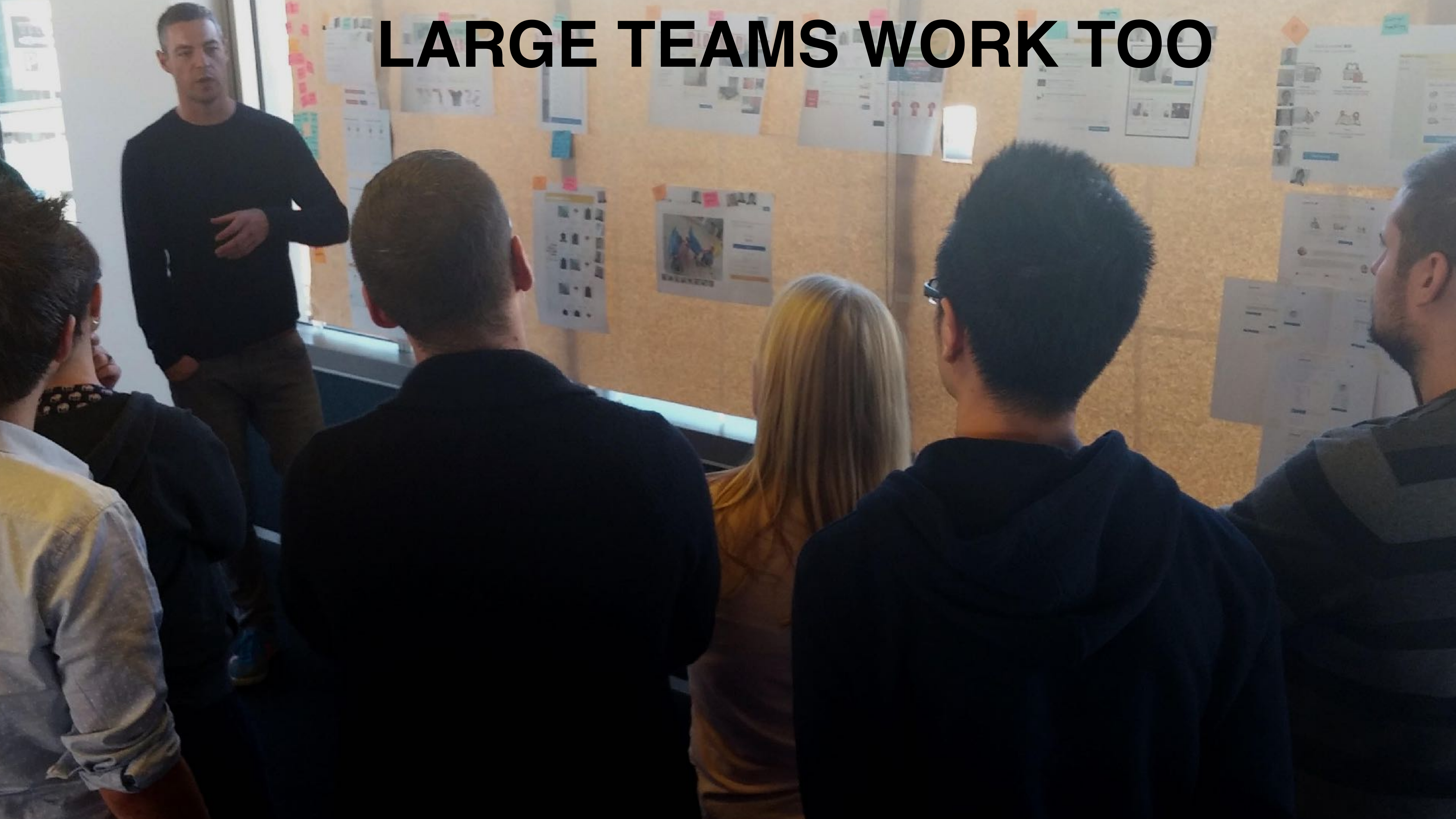


# INEXPERIENCED FACILITATORS?





# LARGE TEAMS WORK TOO





# WHO DECIDES?





# HOW DO TEAM SPLITS HAPPEN?

**LESS FREEDOM**



**Forced splits**

**“Best practices”**

**Managers bring up the idea**

**Team members decide to split**

**Teams dream up liberating structures**

**MORE FREEDOM**



**WHAT IF THE PEOPLE DECIDE?**

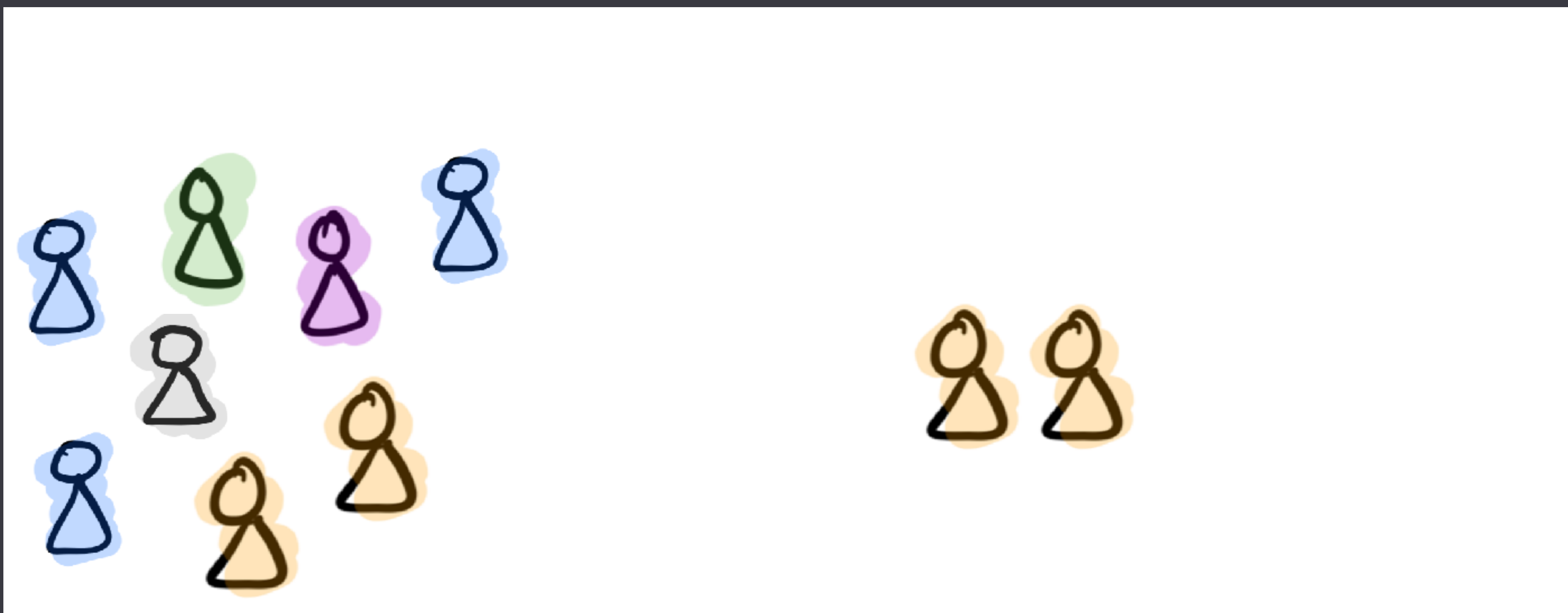




# RETRO ON TEAM COMPOSITIONS









# WHEN TEAMS SPLIT

- Don't share team members.
- Avoid creating dependencies.
- Don't drag it out.
- Change desks.
- Reset calendars/tools.
- **Reset the teams!**

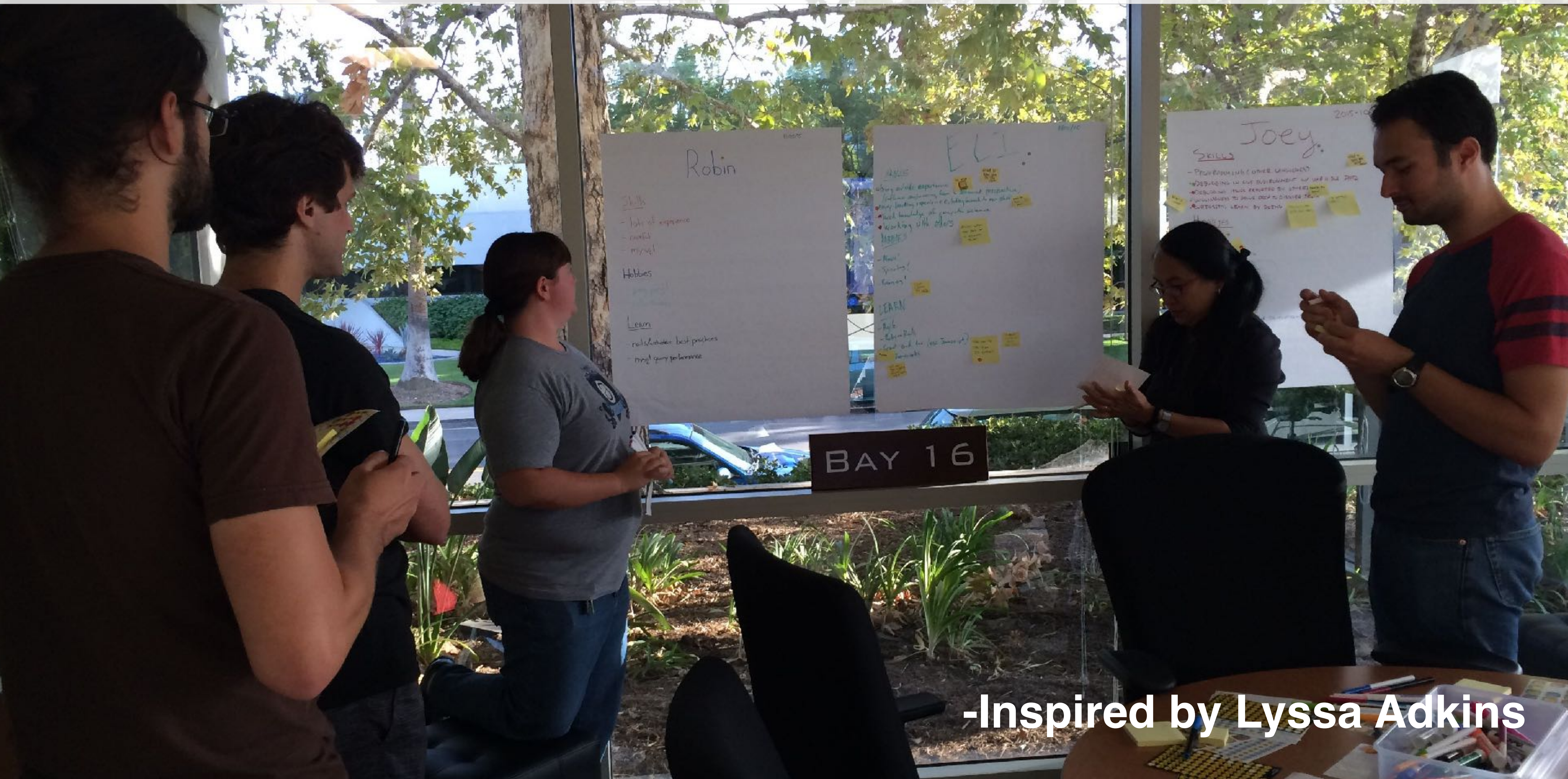


# TEAM “RESETS”





# SHARE SKILLS, INTERESTS, NEEDS



-Inspired by Lyssa Adkins



# ALIGN ON THE WORK

## Users & Customers

What types of users and customers have the challenges your solution addresses?

Look for differences in user's goals or uses that would affect their use of the product. Separate users and customers into different types based on those differences that make a difference. It's a bad idea to target "everyone" with your product.

## Problems

What problems or challenges do your target users and customers today that your solution addresses?

What needs, goals, or jobs-to-be-done should your solution address?

## Solution Idea

What product, feature, or enhancement ideas best solve the problems for your target audience.

## How will users use your solution?

If your target audience has your solution, what will they do differently as a consequence? And, how will that benefit them?

## User Metrics

What specific user behaviors can you measure that will indicate they try, adopt, use, and place value in your solution?

2

1

1

5

6

## Solutions Today

How do users address their problems today?

List competitive products or work-around approaches your users have for meeting their needs.

3

## Adoption Strategy

How will customers and users discover and adopt your solution?

7

## Business Challenges

How do the customers' and users' and their challenges above impact your business? If you don't solve these problems for your customers and users, will it hurt your business? How?

4

## Budget

1. What might it cost your organization if you don't create this solution?
2. What might your organization earn or save if you do?
3. Given that, what would your organization budget to create this solution?

9

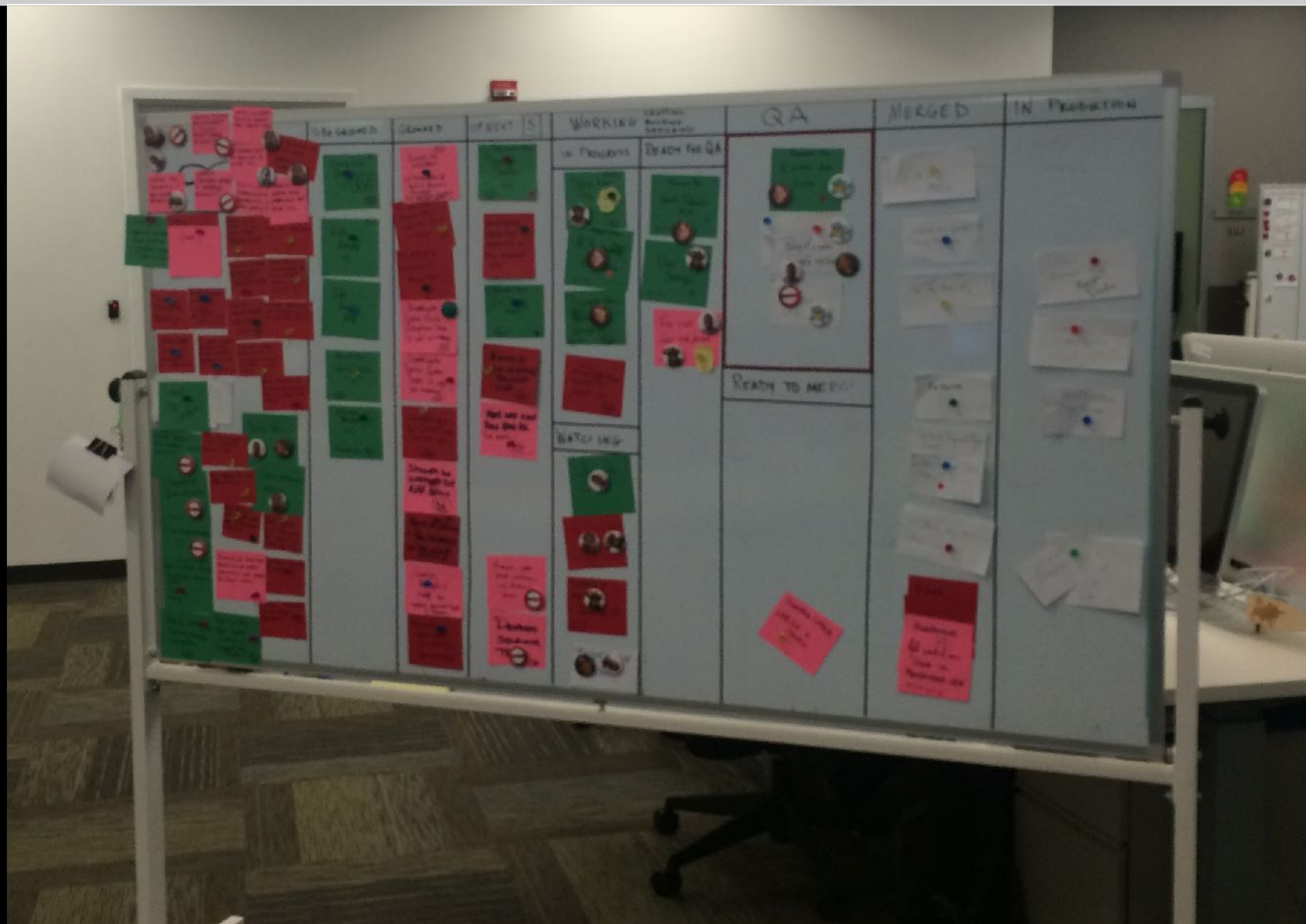
## Business Benefits and Metrics

What business performance metrics will be affected by the success of this solution? These usually change as a consequence of users actually buying and using your solution.

8



# VISUALIZE WORKFLOW TO DERIVE AGREEMENTS





# DESIGN ALLIANCE/CONFLICT PROTOCOLS

Atmosphere / Culture

CAN REQUEST + RECEIVE HELP  
(SUPPORTIVE)

OPTIMISM

CONSTANT COMMUNICATION

MUTUAL RESPECT &  
RESPECT FOR DIFFERENCES

TRUST

FUN

IDEA HIGH; COLLABORATION  
& PASSION

When things get difficult...

OPENNESS + COMMUNICATION

STAYING CONSTRUCTIVE

What makes team awesome?  
What is needed so all flourish?

SHARED VISION

CELEBRATE SUCCESS  
Refreshing Beverages ☺

SAFETY to FAIL

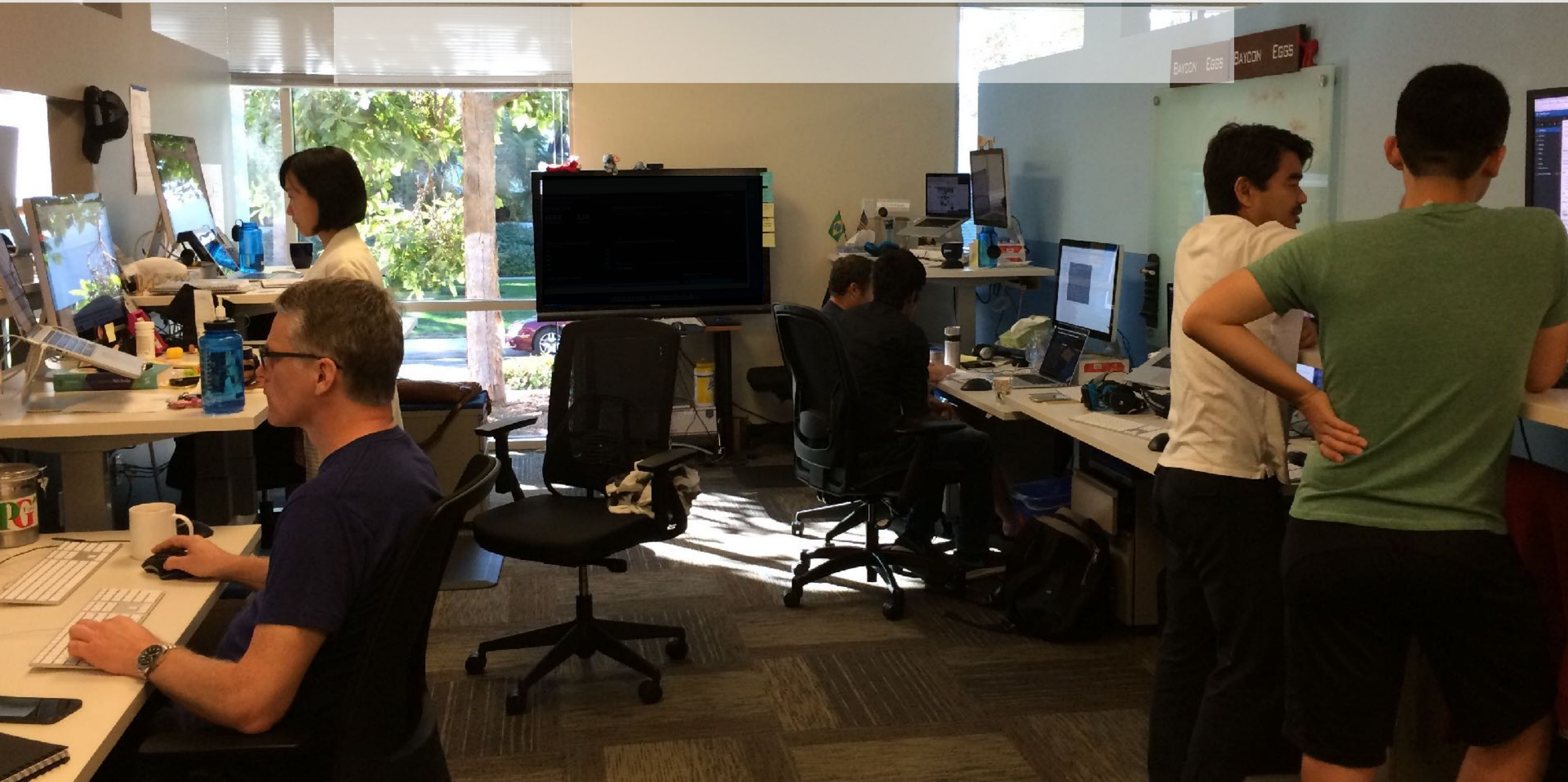
APPRECIATION

Part

CHARACTERISTICS



# RULES FOR “LIVING TOGETHER”





# CREATING INTELLIGENT TEAMS

Leading with Relationship Systems Intelligence

Anne Rød  
Marita Fridjhon

The Pragmatic  
Programmers

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## Liftoff<sup>Second Edition</sup>

Start and Sustain  
Successful Agile Teams



Diana Larsen  
and Ainsley Nies  
*edited by Katharine Doorak*

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O'REILLY®



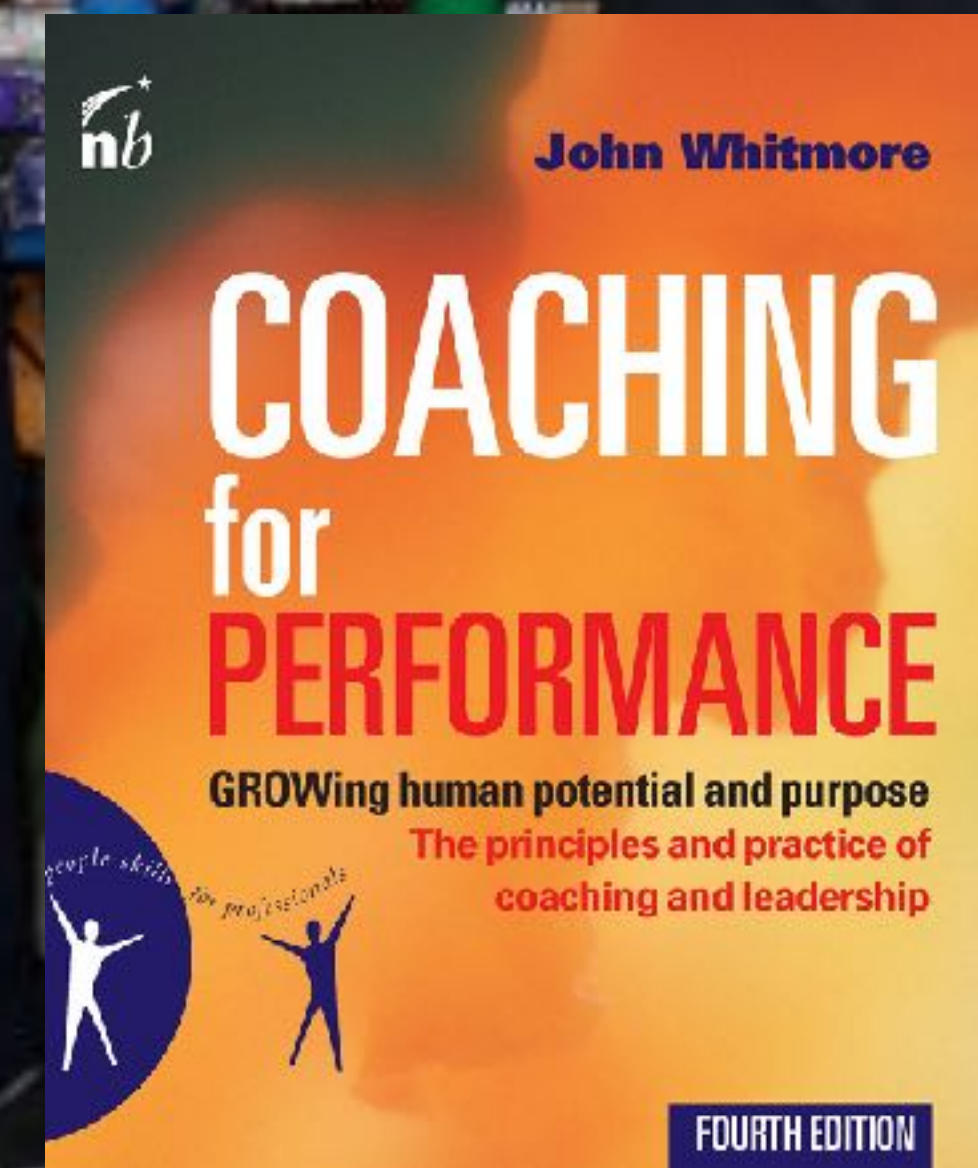
## User Story Mapping

DISCOVER THE WHOLE STORY,  
BUILD THE RIGHT PRODUCT

Jeff Patton



# BUILD RELATIONSHIPS IN THE LARGE





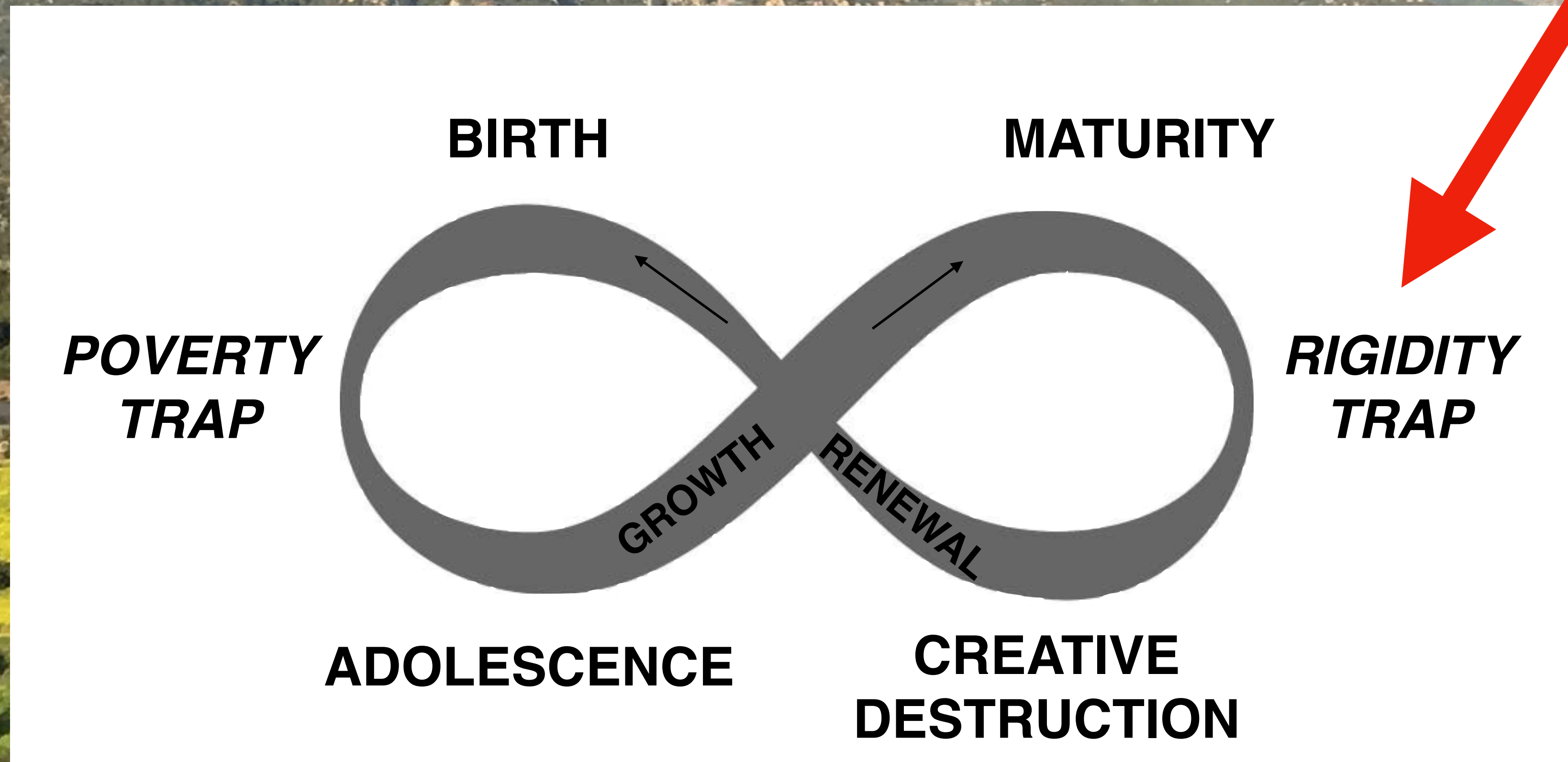
## **PROBLEM:**

**Knowledge rigidity traps -  
Towers of knowledge**

## **PATTERN:**

**Pairing, cross-team  
switching**





Adapted from Gunderson and Holling, 2003  
Keith McCandless & Fisher Qua, Liberating Structures



# THE TOWER OF KNOWLEDGE PROBLEM



***-Richard Sheridan***



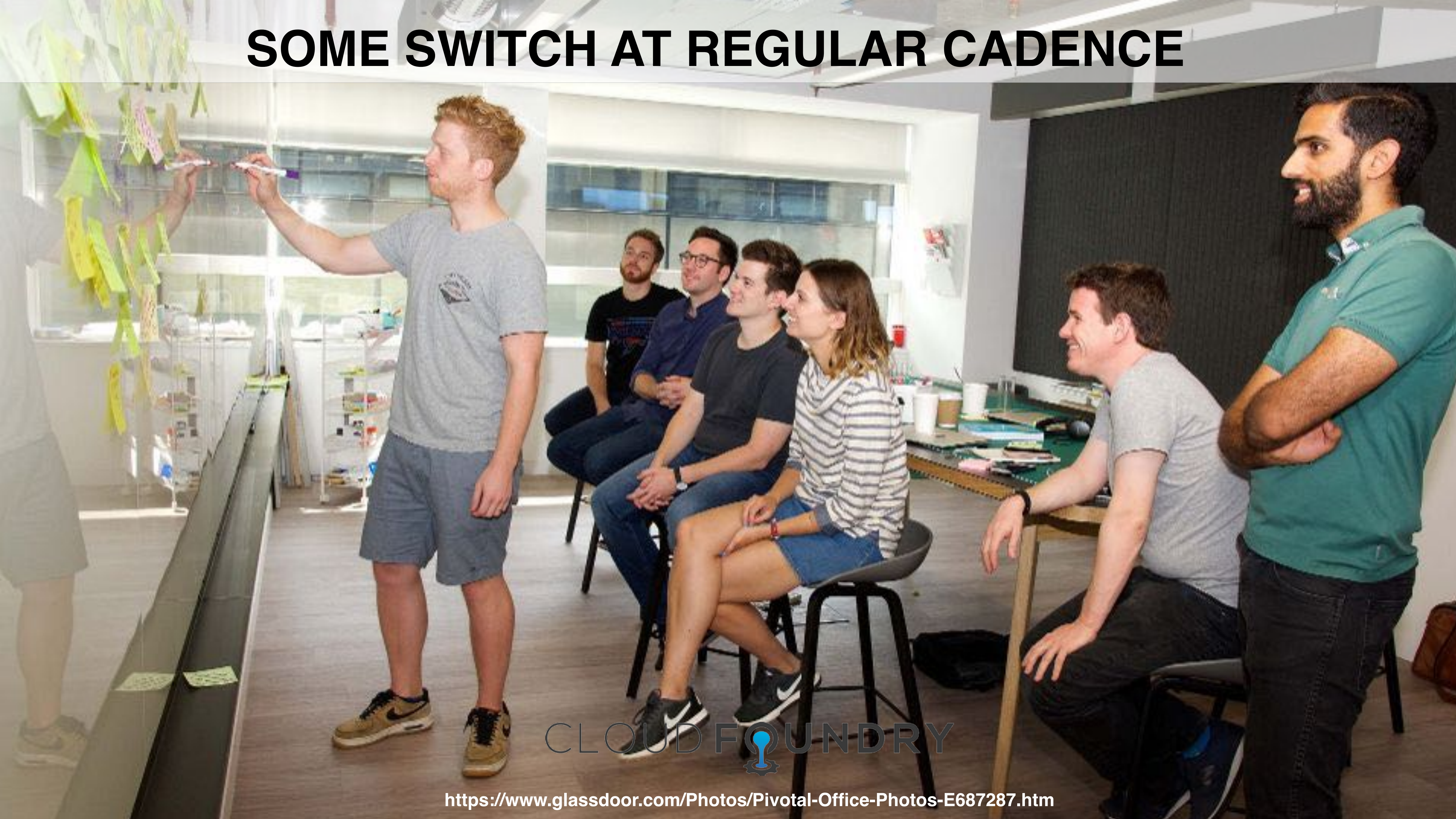
# PAIRING & SWITCHING PAIRS



2012 Creative Commons - Attribution. [menloinnovations.com](http://menloinnovations.com)



# SOME SWITCH AT REGULAR CADENCE

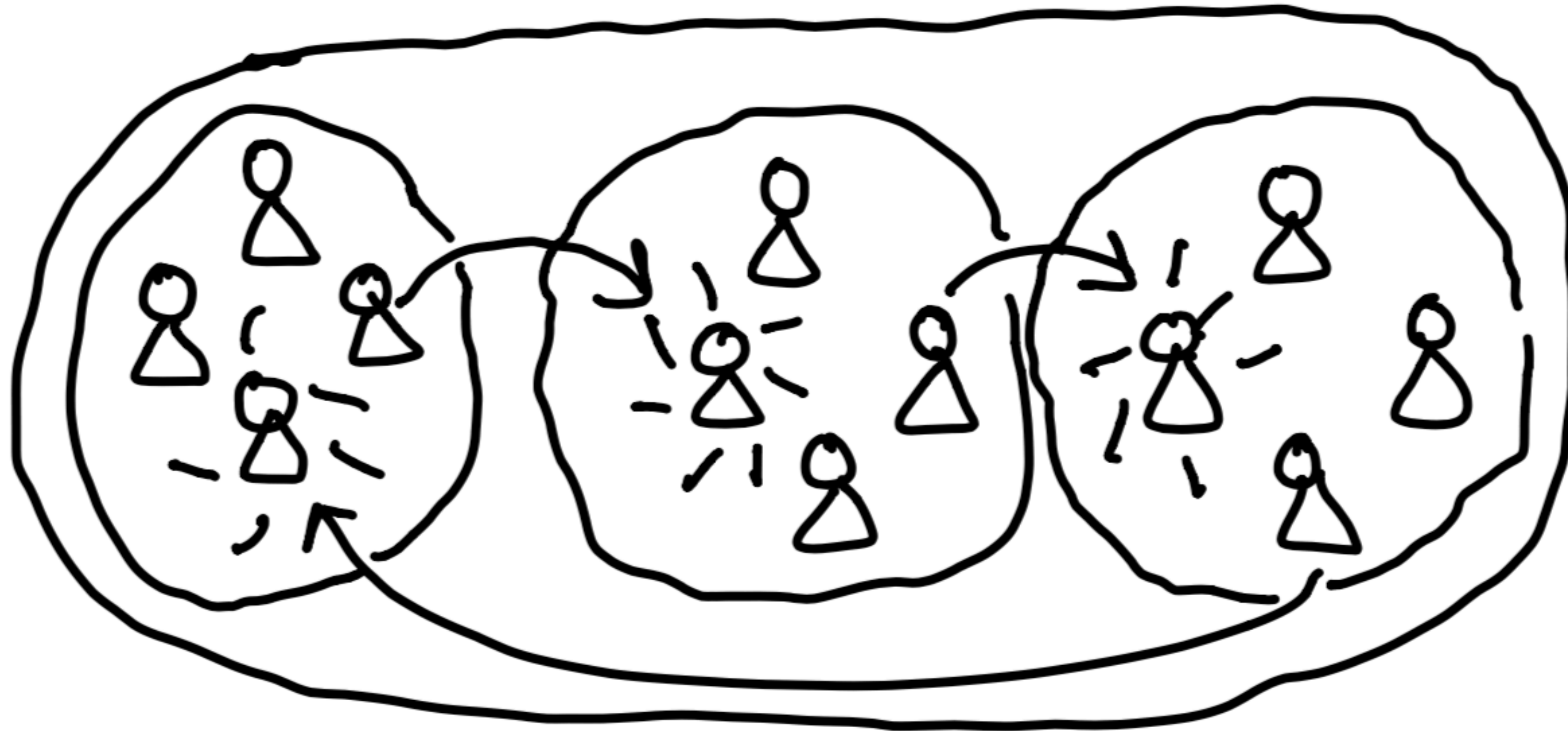


CLOUD FOUNDRY

<https://www.glassdoor.com/Photos/Pivotal-Office-Photos-E687287.htm>



# CROSS-TEAM SWITCHING PATTERN





# PREVENT TEAM TOWERS OF KNOWLEDGE



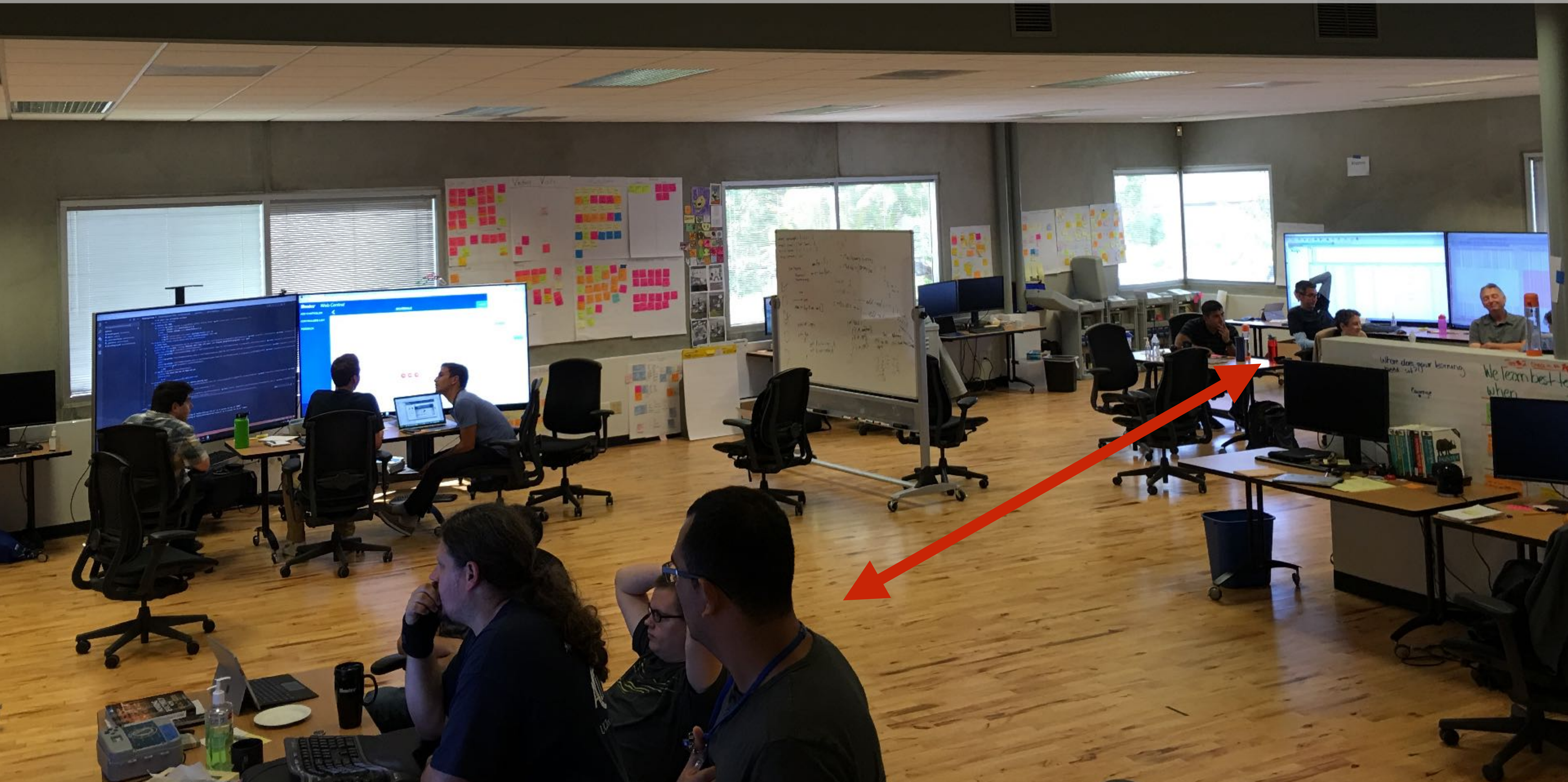


# MOB PROGRAMMING





# TEAM MEMBERS NEGOTIATE TRADES







**SHARE EXPERTISE BY NOMADING**





**GIVE YOURSELF OPTIONS FOR LATER!!!!!!**





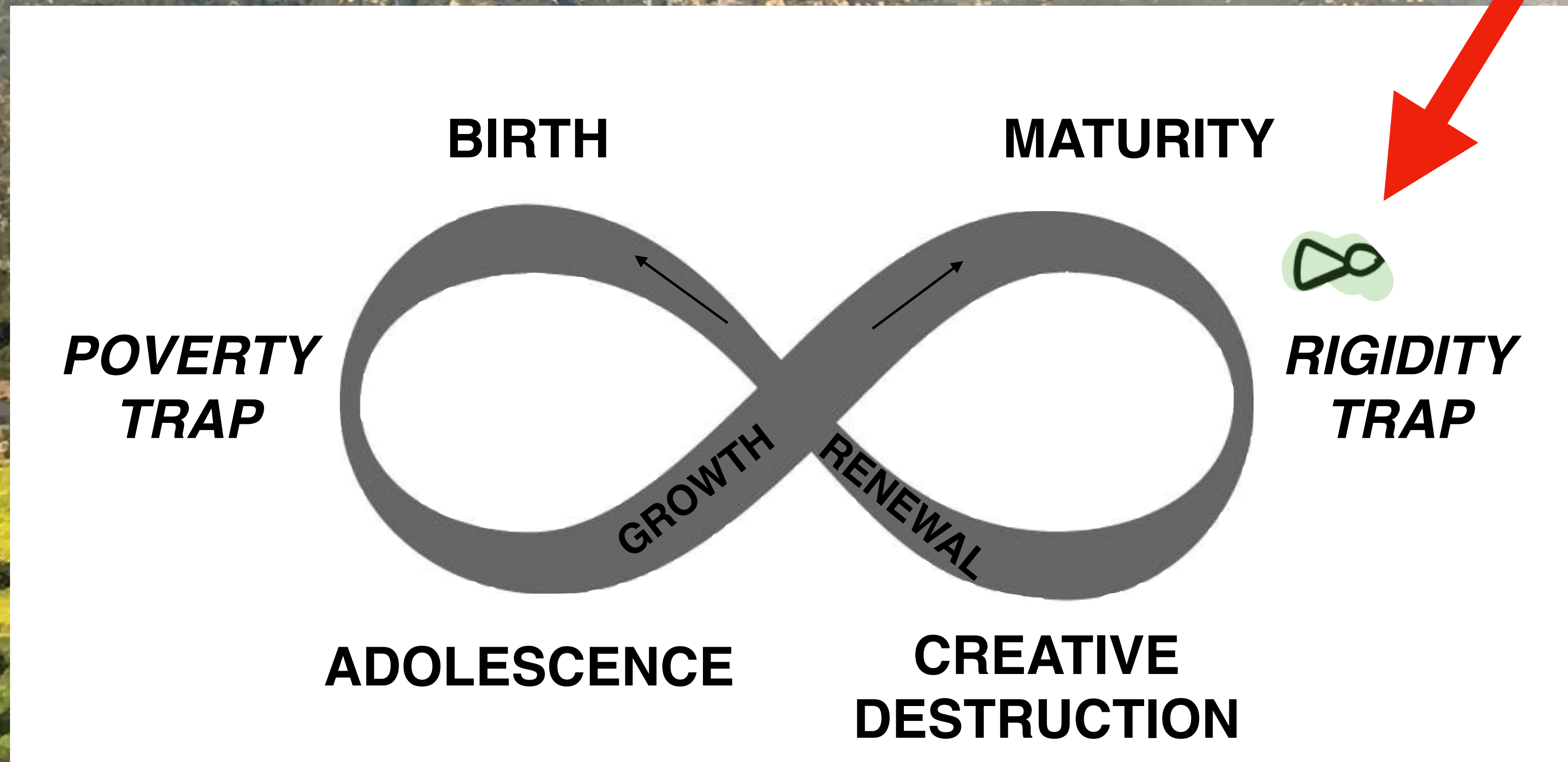
**PROBLEM:**

**Individual rigidity traps/  
stagnation**

**PATTERN:**

**Opportunity matching**





Adapted from Gunderson and Holling, 2003  
Keith McCandless & Fisher Qua, Liberating Structures



**FORMING**  
**STORMING**  
**NORMING**  
**PERFORMING**  
**(ADJOURNING)**

1977

**Tuckman's**  
**Model**  
**1965**



# STAGNATING











I'm so sick of  
this guy

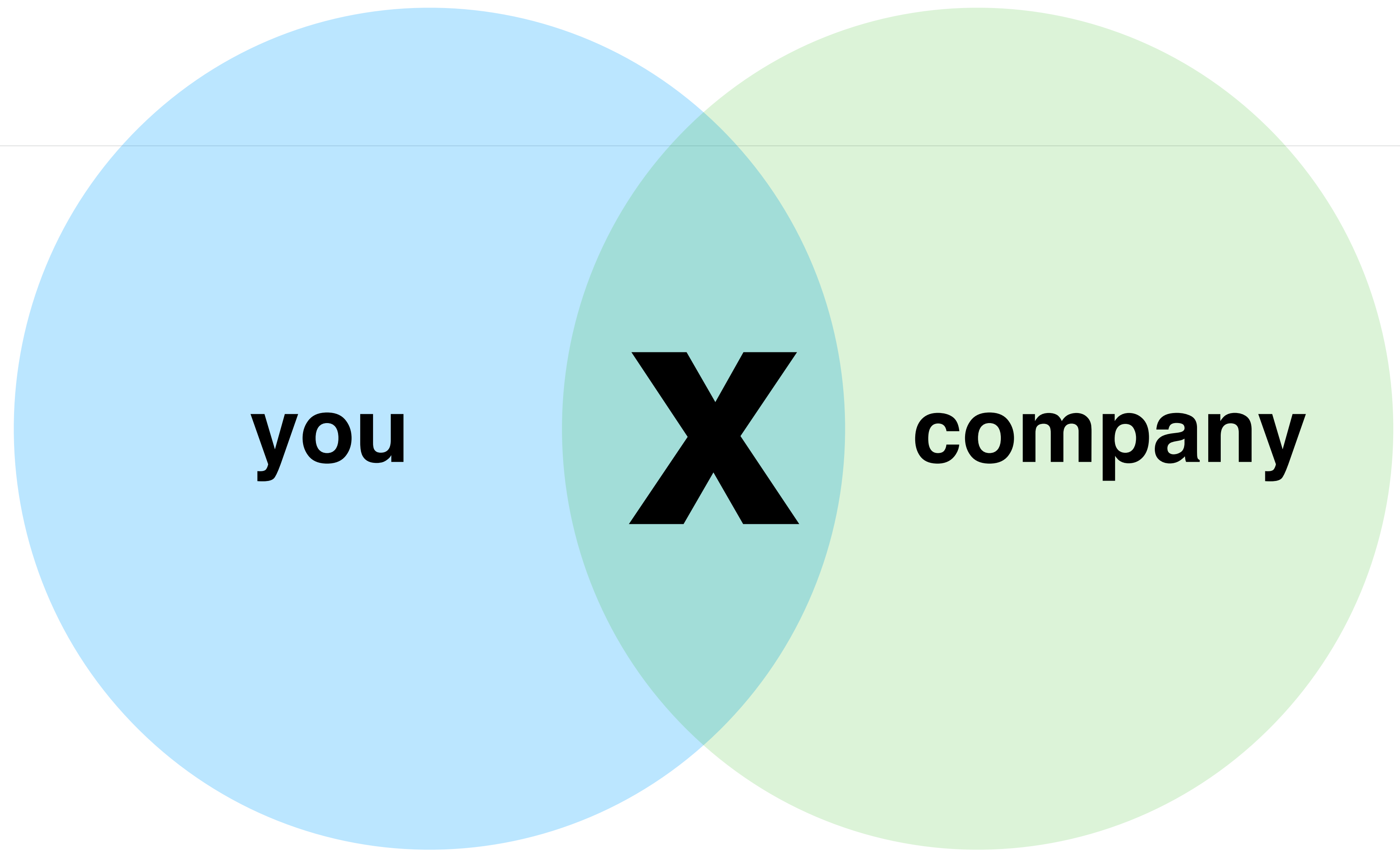
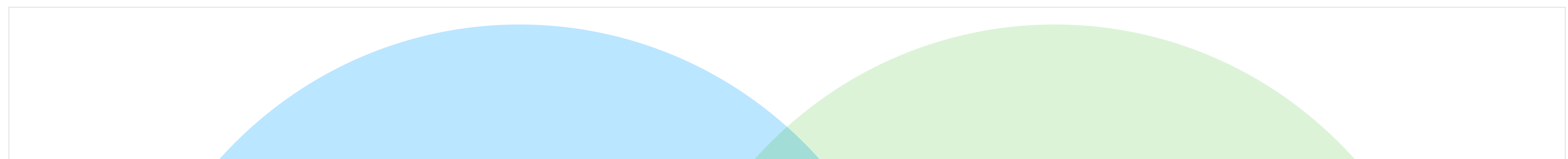






**THIS IS  
YOUR LIFE**







**WATCH THE ENERGY - BE CURIOUS**





# SURVEY PEOPLE

## Team Rotation

We're sending this form out to all developers, please use this form to indicate if you're interested on swapping to to work on a different team. Benefits of swapping are that you can broaden your knowledge of products and technology used at Unruly plus we have better sharing of knowledge and working practices between teams.

Please will all of you complete this form by lunchtime on Friday August 2nd.

Your email address ([rachel.davies@unrulygroup.com](mailto:rachel.davies@unrulygroup.com)) will be recorded when you submit this form.

Not [rachel.davies](#)? [Sign out](#)

\* Required

**Would you be interested in working on another team within Product Development? \***

Please indicate how interested you are to change team

**Which team would you like to be considered for?**

Please indicate if you have a preference.

- ☐ Chutney
- ☐ Marmalade
- ☐ Tabasco

**How soon would you like to try a swap onto another team?**

**Notes**

Please let us know if there's anything else we should bear in mind.



# UNDERSTAND NEEDS





# OPPORTUNITY MATCHING - VISUALIZE IT



**#openness**



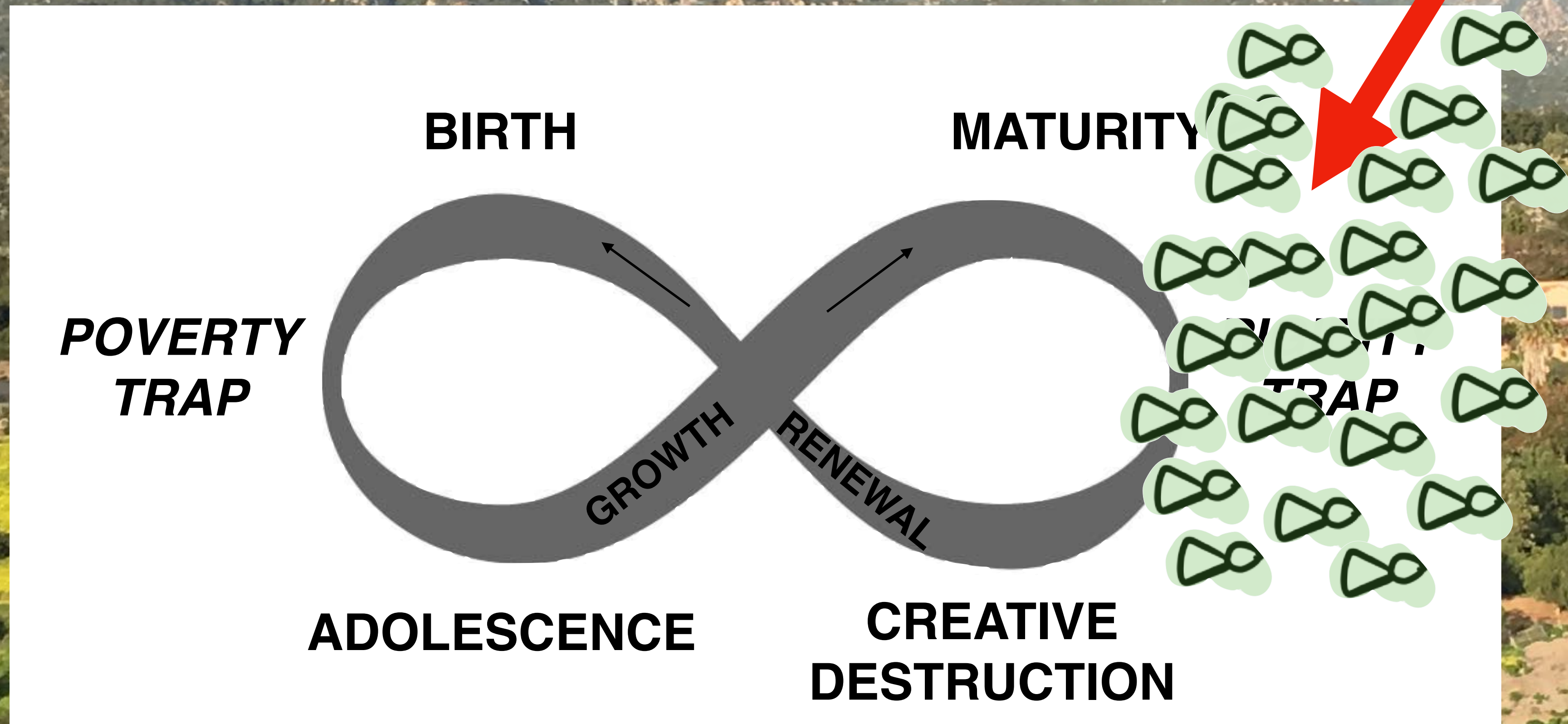
## **PROBLEM:**

**Multi-team rigidity traps/  
stagnation**

## **PATTERN:**

**Self-selection events/  
whiteboarding**

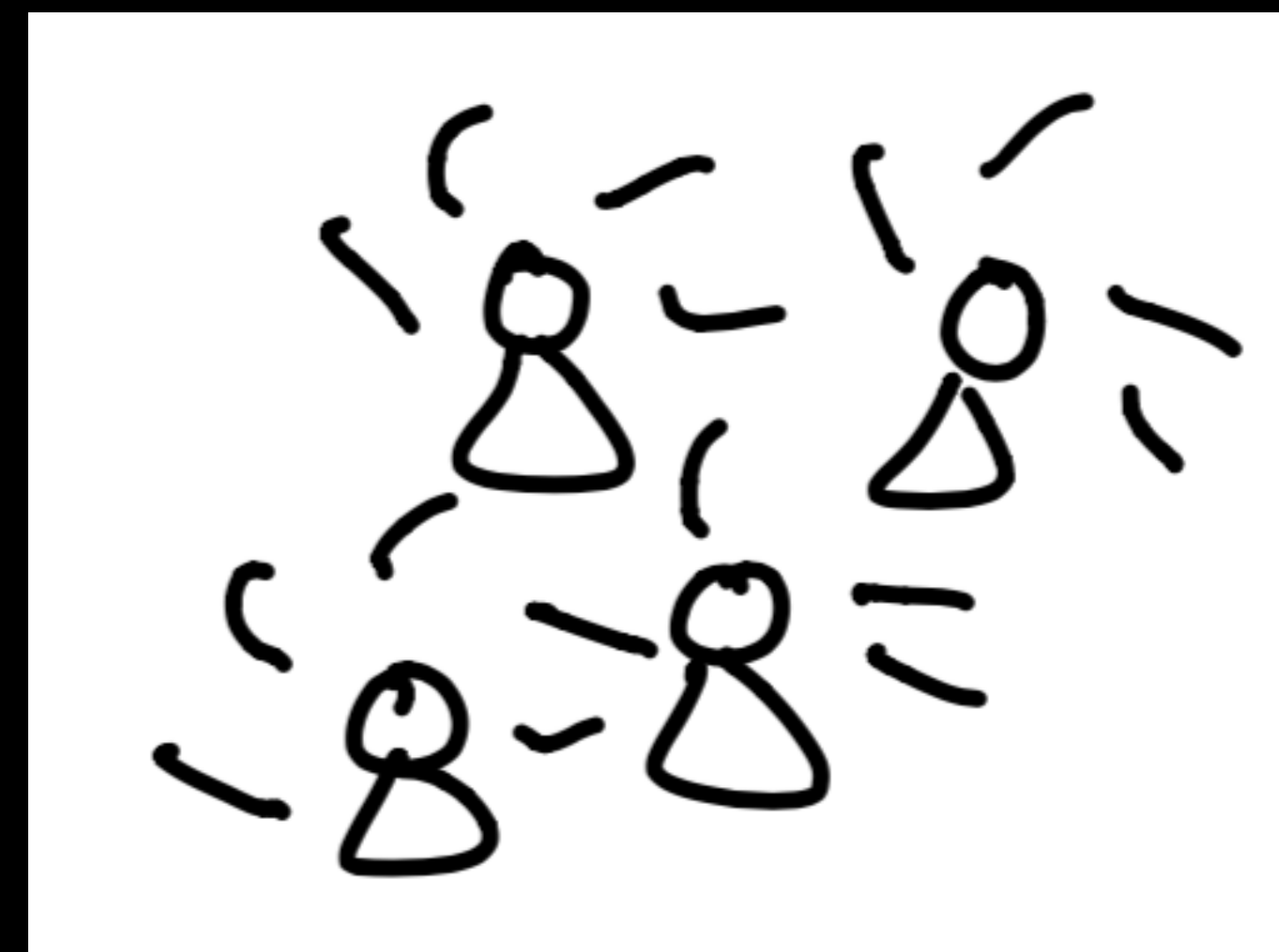
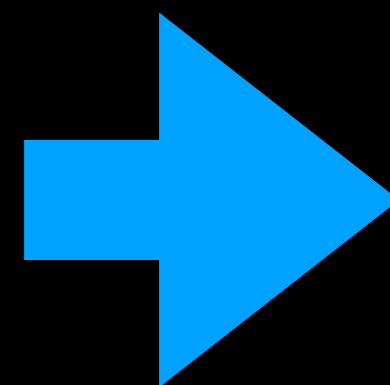
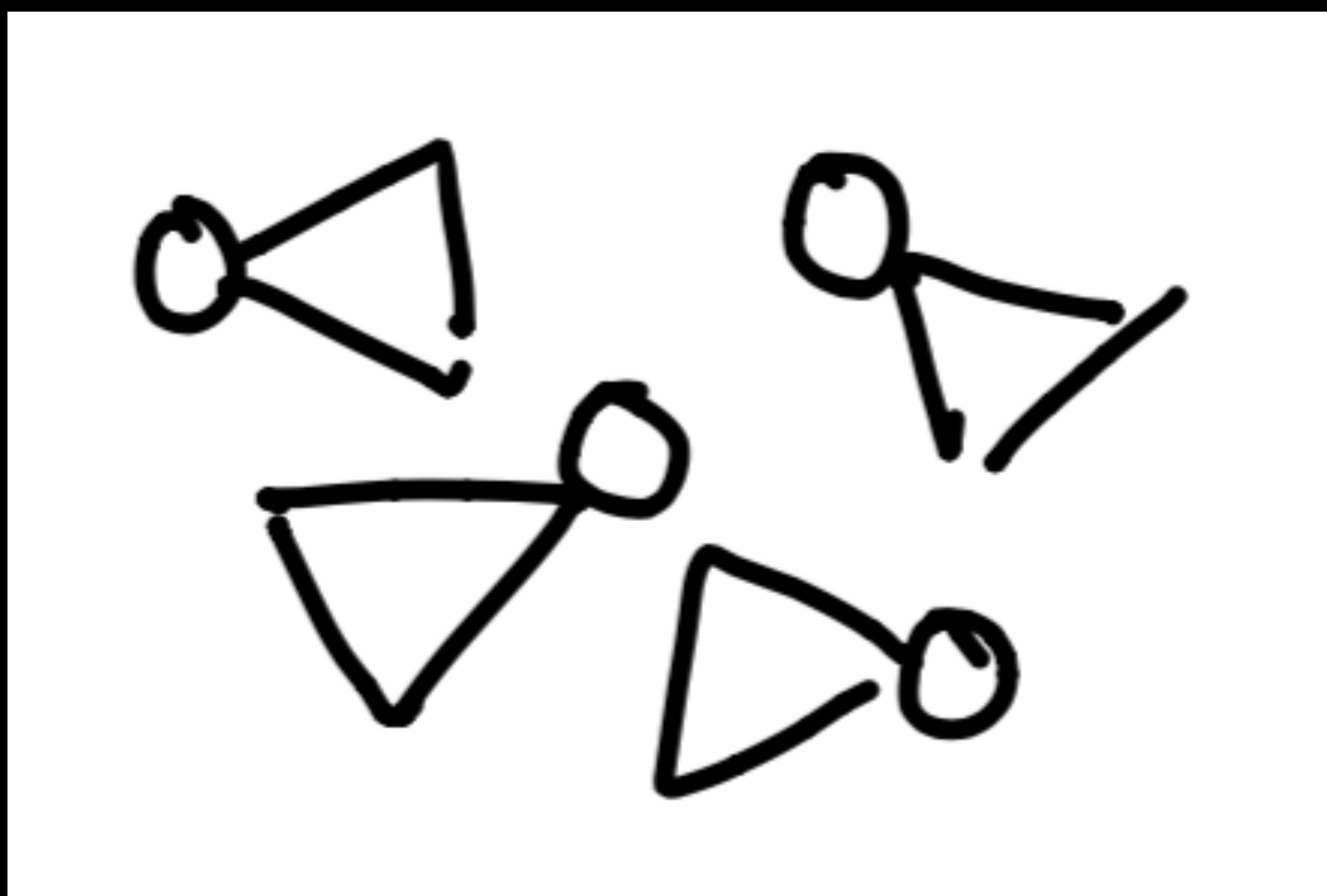




Adapted from Gunderson and Holling, 2003  
Keith McCandless & Fisher Qua, Liberating Structures



# SHIFT THE ENERGY





# RETEAM AT AN OFFSITE, ON A CADENCE



## Let's run an experiment! Self-selection at HBC Digital

CULTURE

Dana Pylayeva, Agile Coach

MAY 31, 2017

15 min Read Time



Inspired by Opower's success story, we ran a self-selection experiment at HBC Digital.

Dubbed as *"the most anticipated event of the year"* it enabled 39 team members to self-select into 4 project teams. How did they do it? By picking a project they wanted to work on, the teammates they wanted to work with and keeping a *"Do what's best for the company"* attitude. Read on to learn about our experience and consider giving a self-selection a try!



# TRY IT OUT DURING A HACKATHON



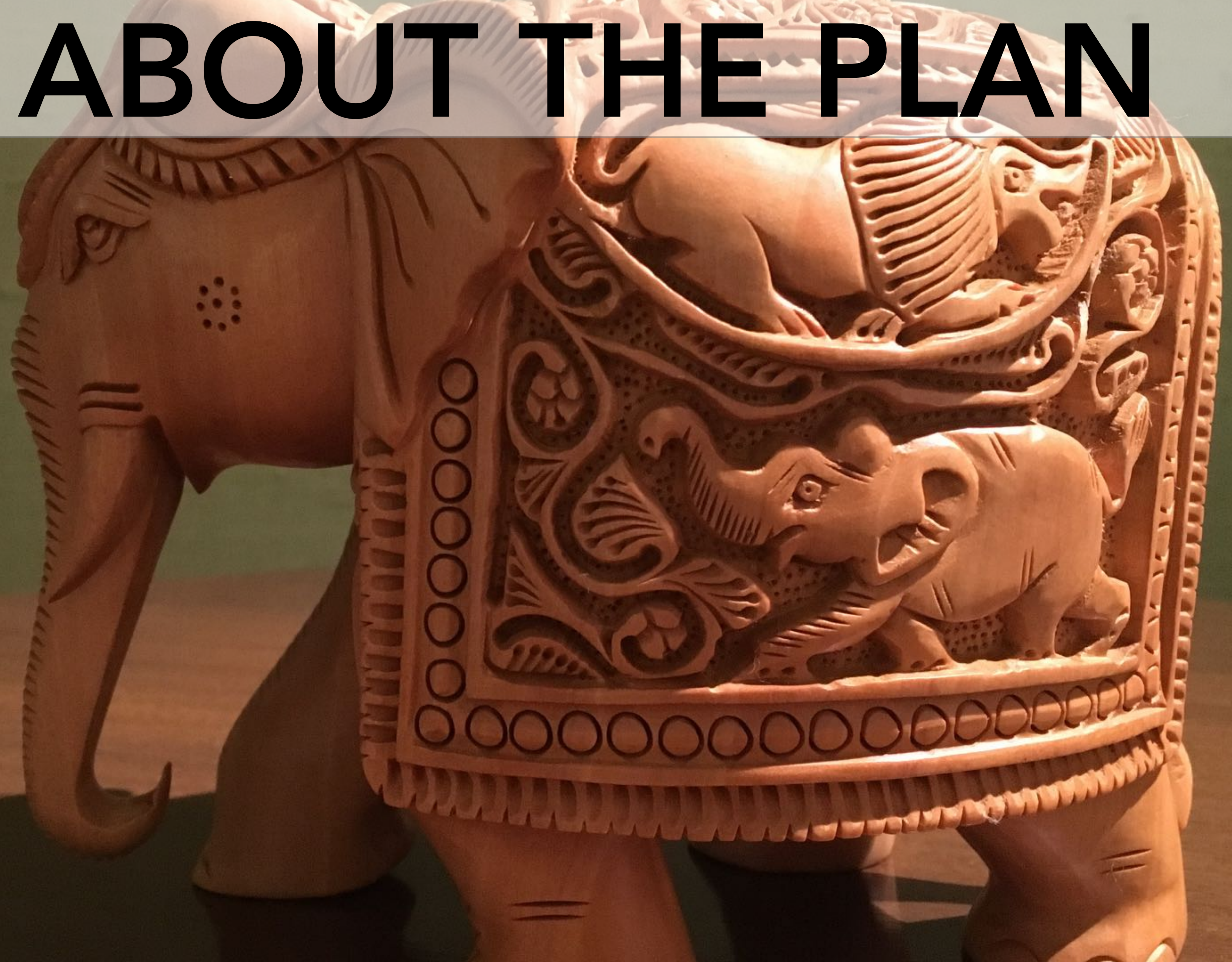


# RETEAM GRADUALLY



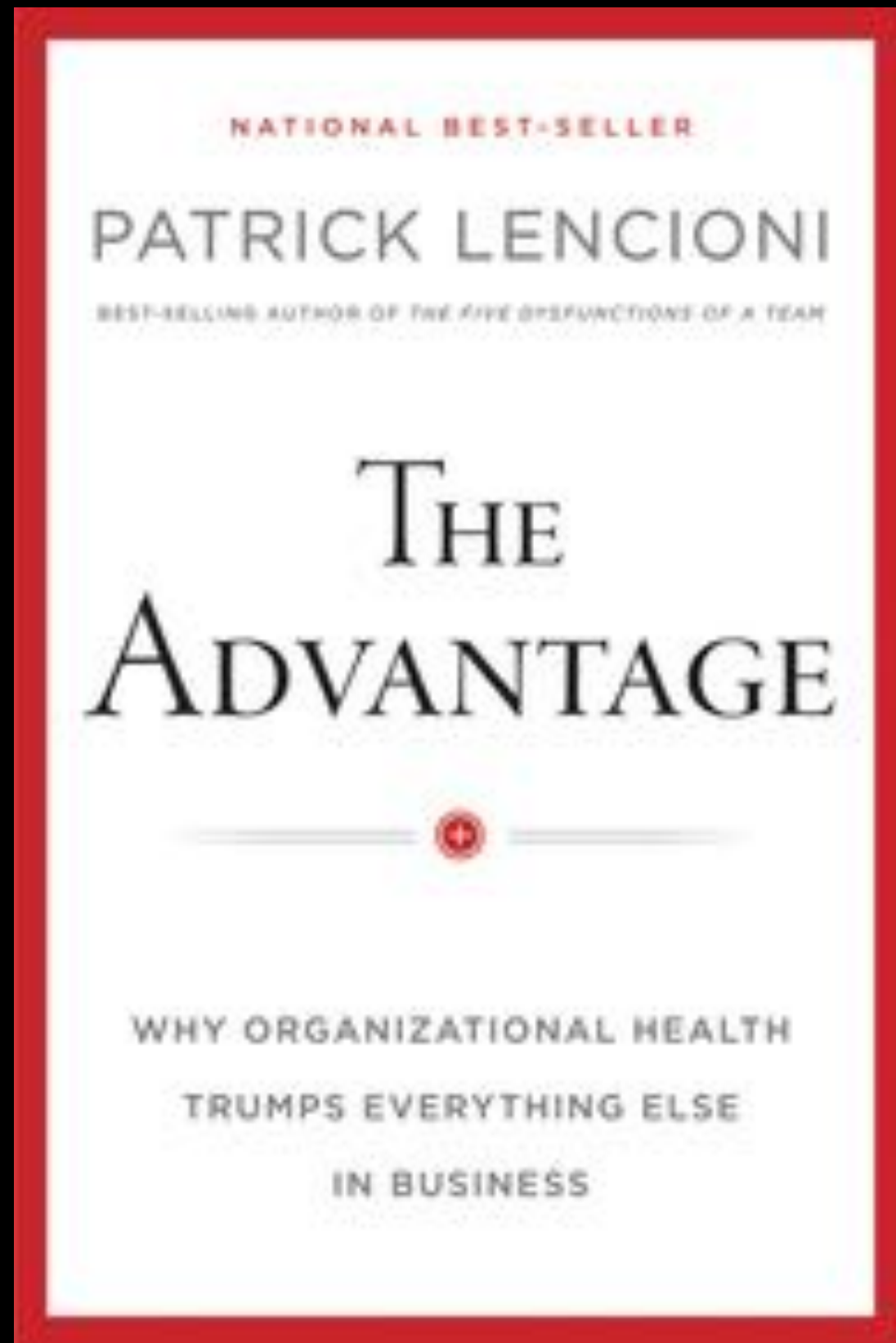


# TALK ABOUT THE PLAN





# OVERCOMMUNICATE THE PLAN



**Say it 7  
times!**





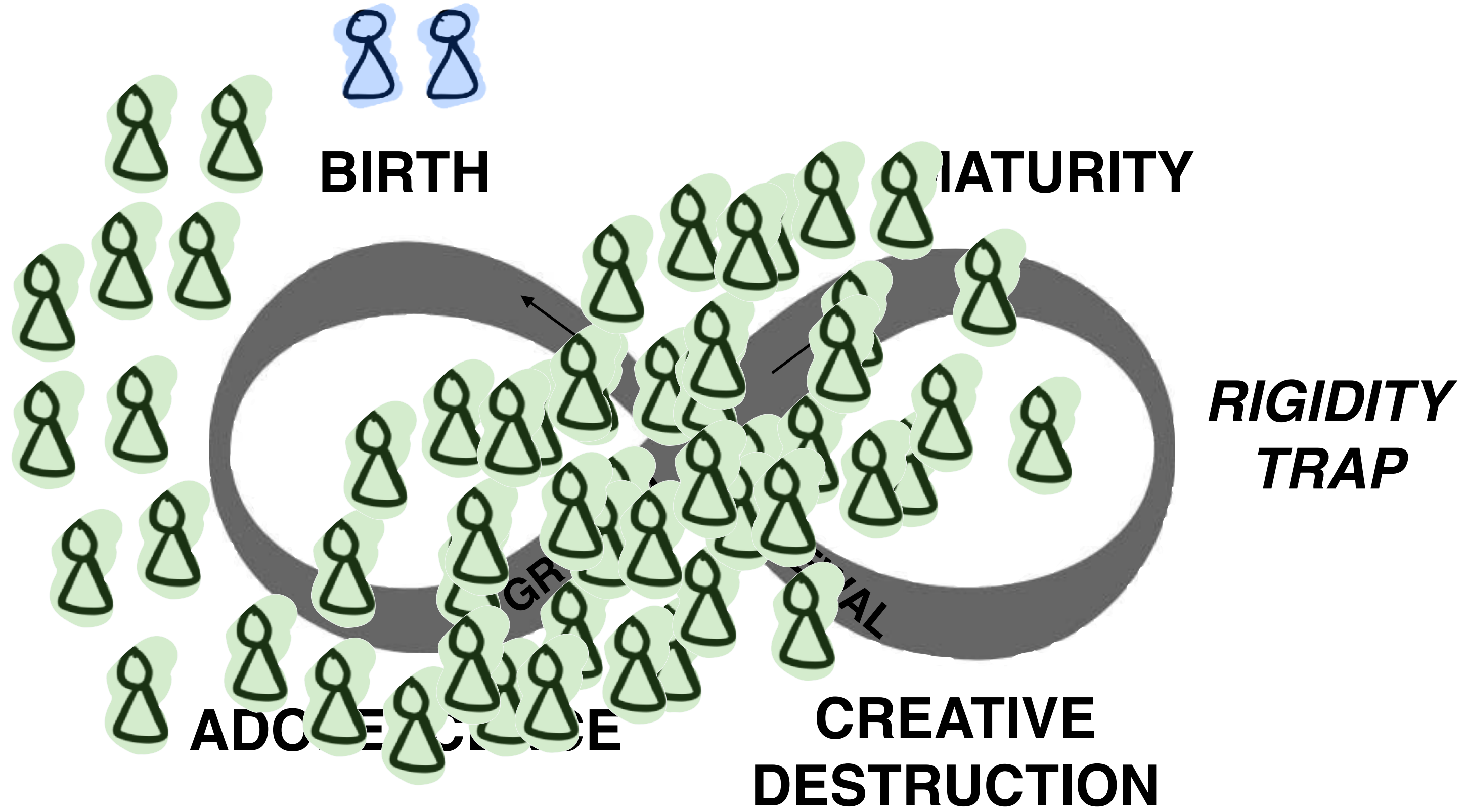
## **PROBLEM:**

**“Fast” growth. Who are these people?**

## **PATTERN:**

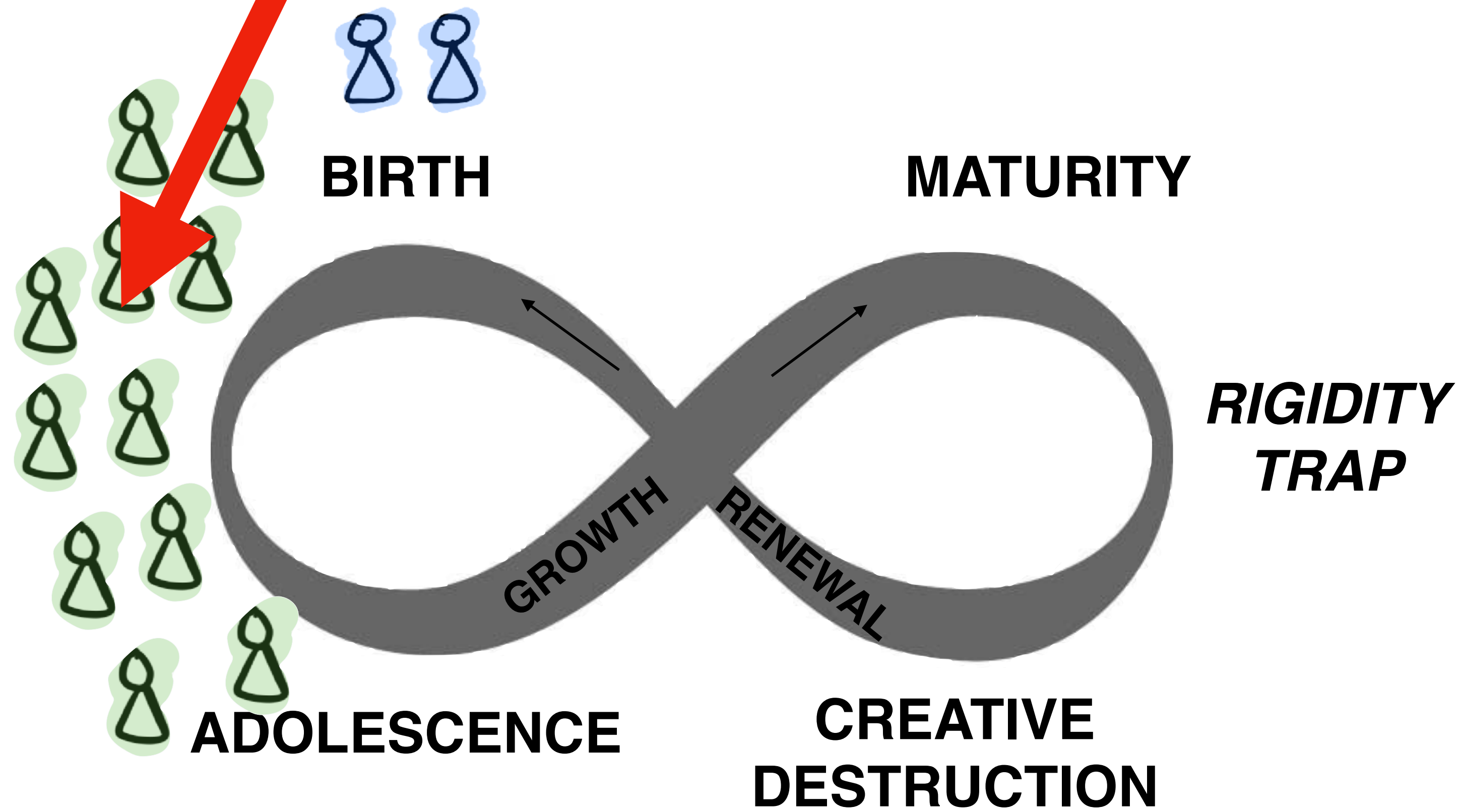
**Self-selected guild formation**







# CONCERNS OF THE “FIRST TEAM”





# WHO ARE ALL THESE PEOPLE?



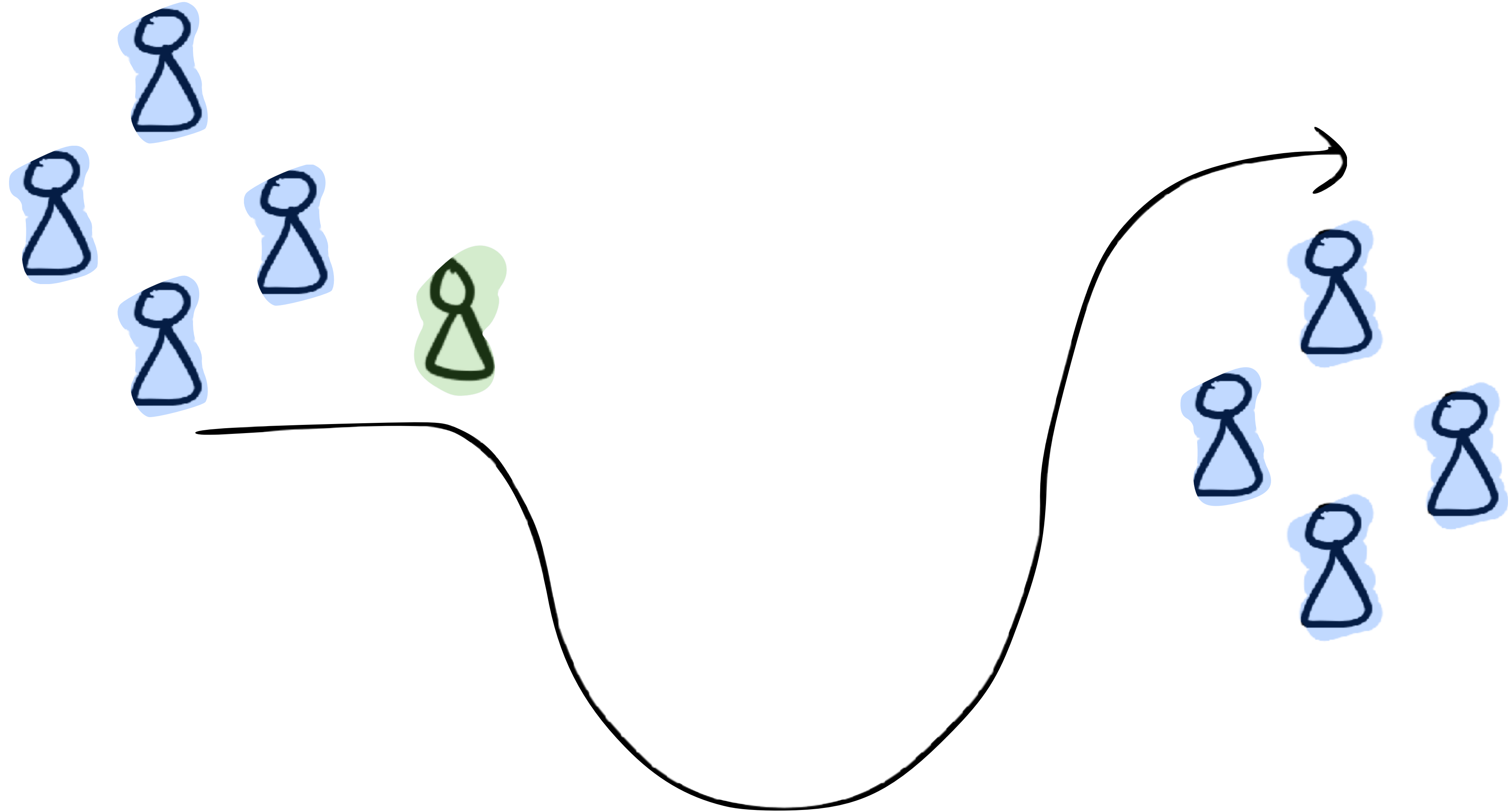


# IT FEELS DIFFERENT





# CHANGE CURVES ABOUND





# **LISTEN FOR THE “FIRST TEAM” CLUES**



**I'm so  
burned out**



**I'm tired**



Should I stay  
or should I  
go?





A black and white photograph of a person in a baseball uniform, seen from the back. The words "THIS IS" are printed in a stylized font across the upper back of the jersey. The person is standing in front of a dark background.

**OUR COMPANY**

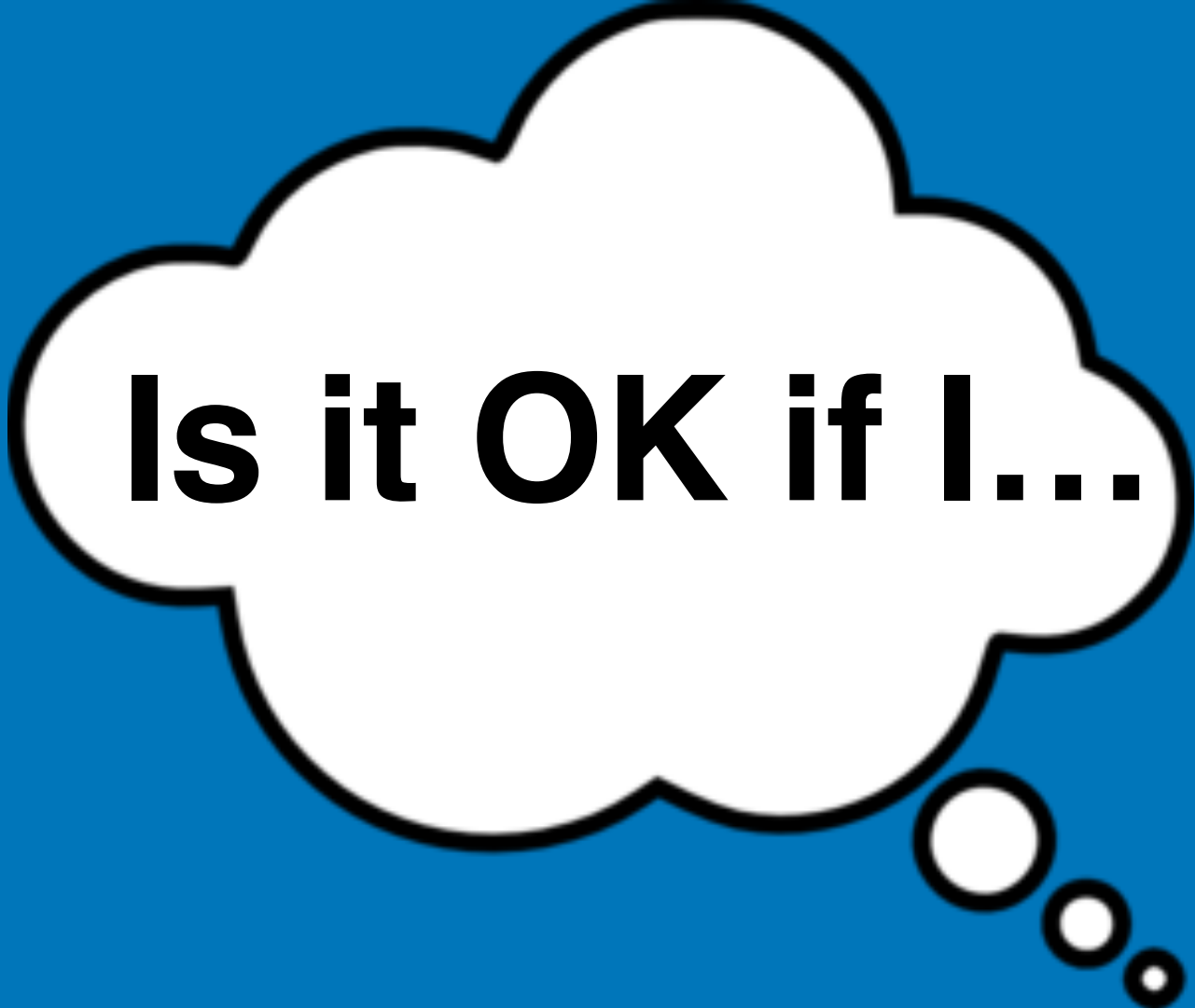






A white thought bubble with a black outline and three small circles leading to it from the bottom left.

**What am I  
allowed to  
do?**

A white thought bubble with a black outline and three small circles leading to it from the bottom right.

**Is it OK if I...**

A white thought bubble with a black outline and three small circles leading to it from the bottom right.

**Is that her  
job?**

A white thought bubble with a black outline and three small circles leading to it from the bottom left.

**Who owns  
that?**





**Why aren't  
people  
stepping up?**



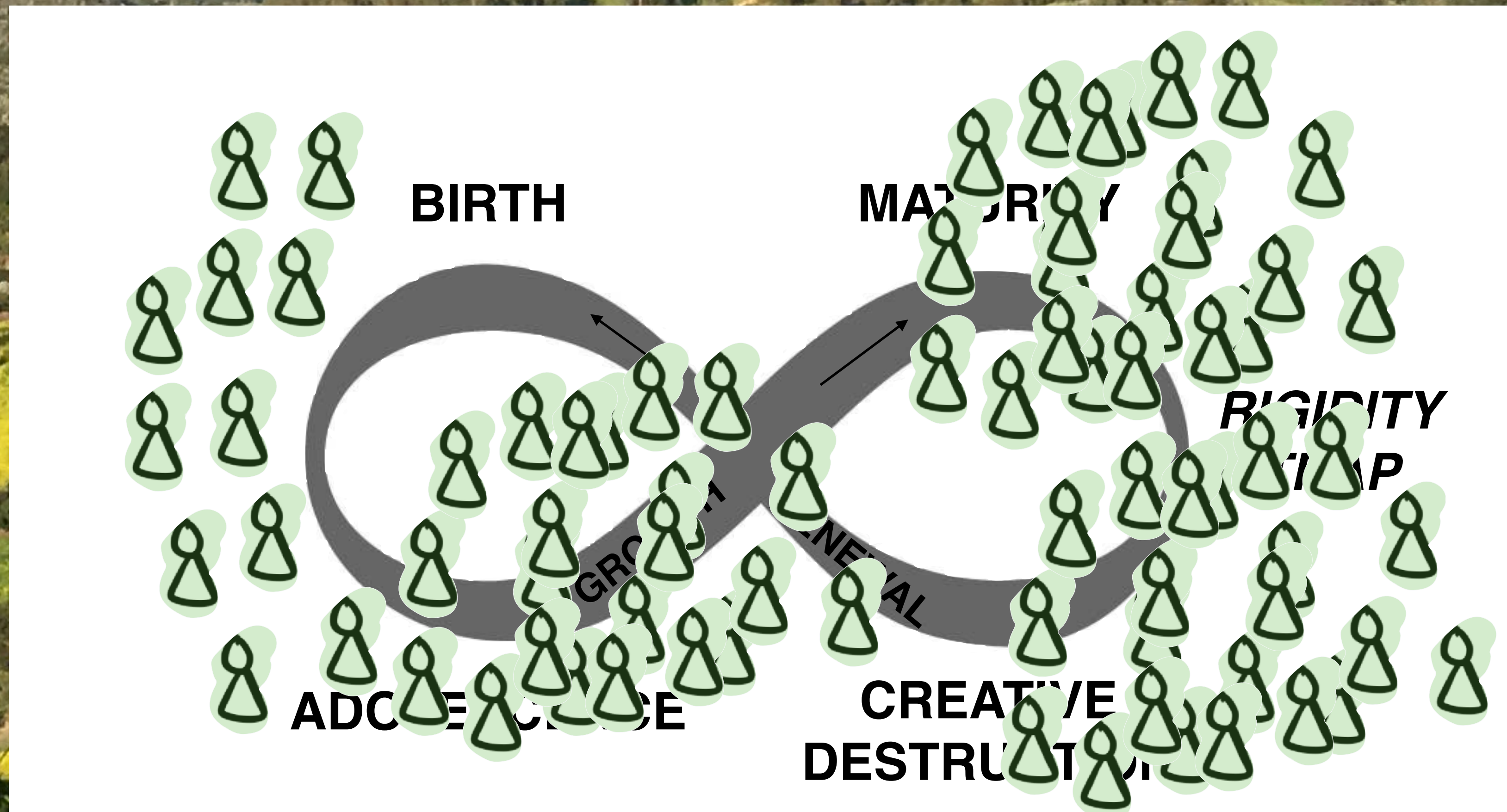
**Don't they  
care?**



**What's his  
name again?**



# CUT THROUGH CONFUSION





**THESE THINGS MIGHT HAPPEN**

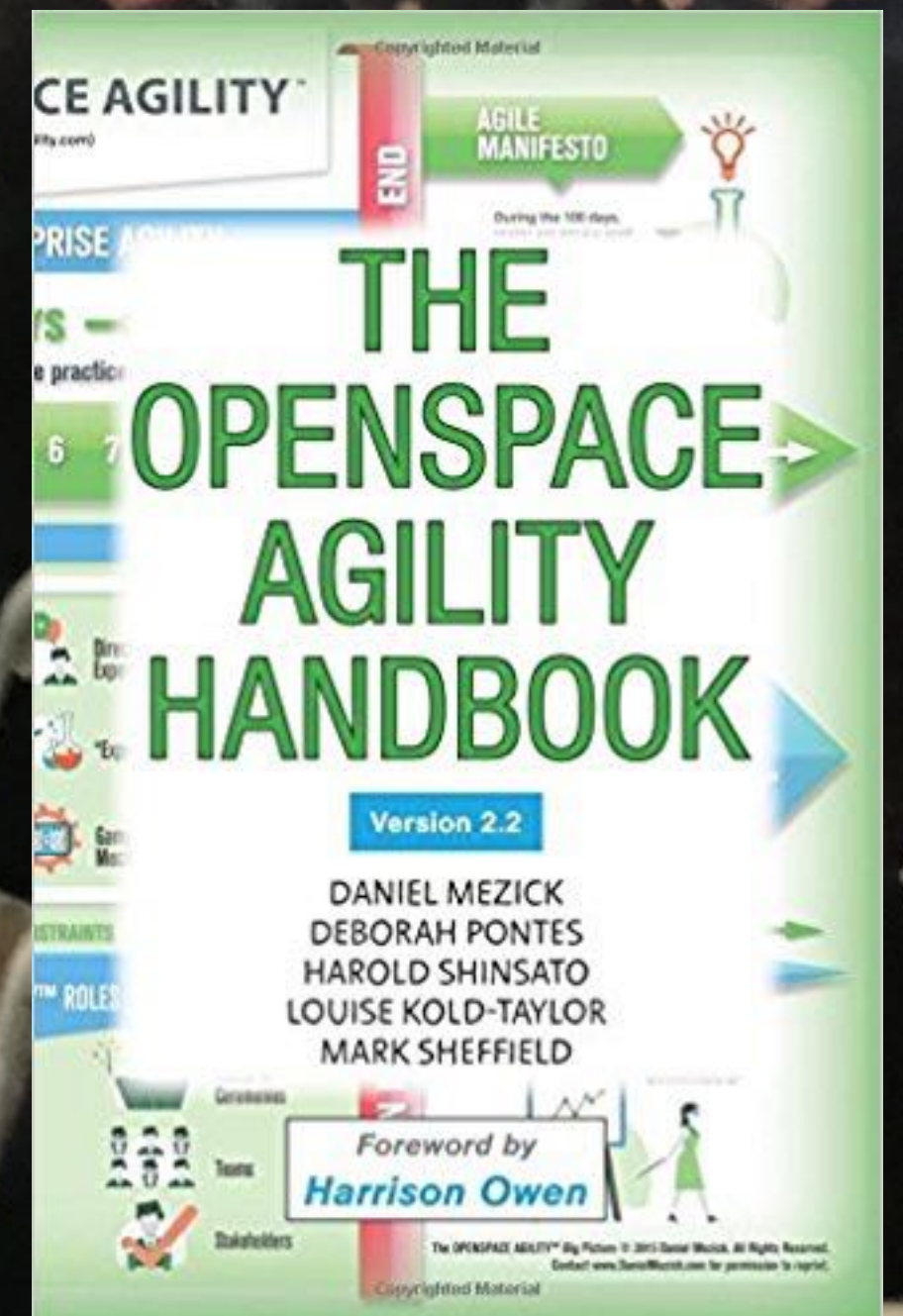
**YOU CATALYZE THE CHANGE**

**“SOMEONE” IMPOSES CHANGE**

**EVOKE THE CHANGE**



# OPEN SPACE ELICITS PASSION & COMMUNITY





# THE PEOPLE BUILD THE SCHEDULE





# THE PEOPLE FIND EACH OTHER





# YOU CAN “SEE” THE RESONANT TOPICS



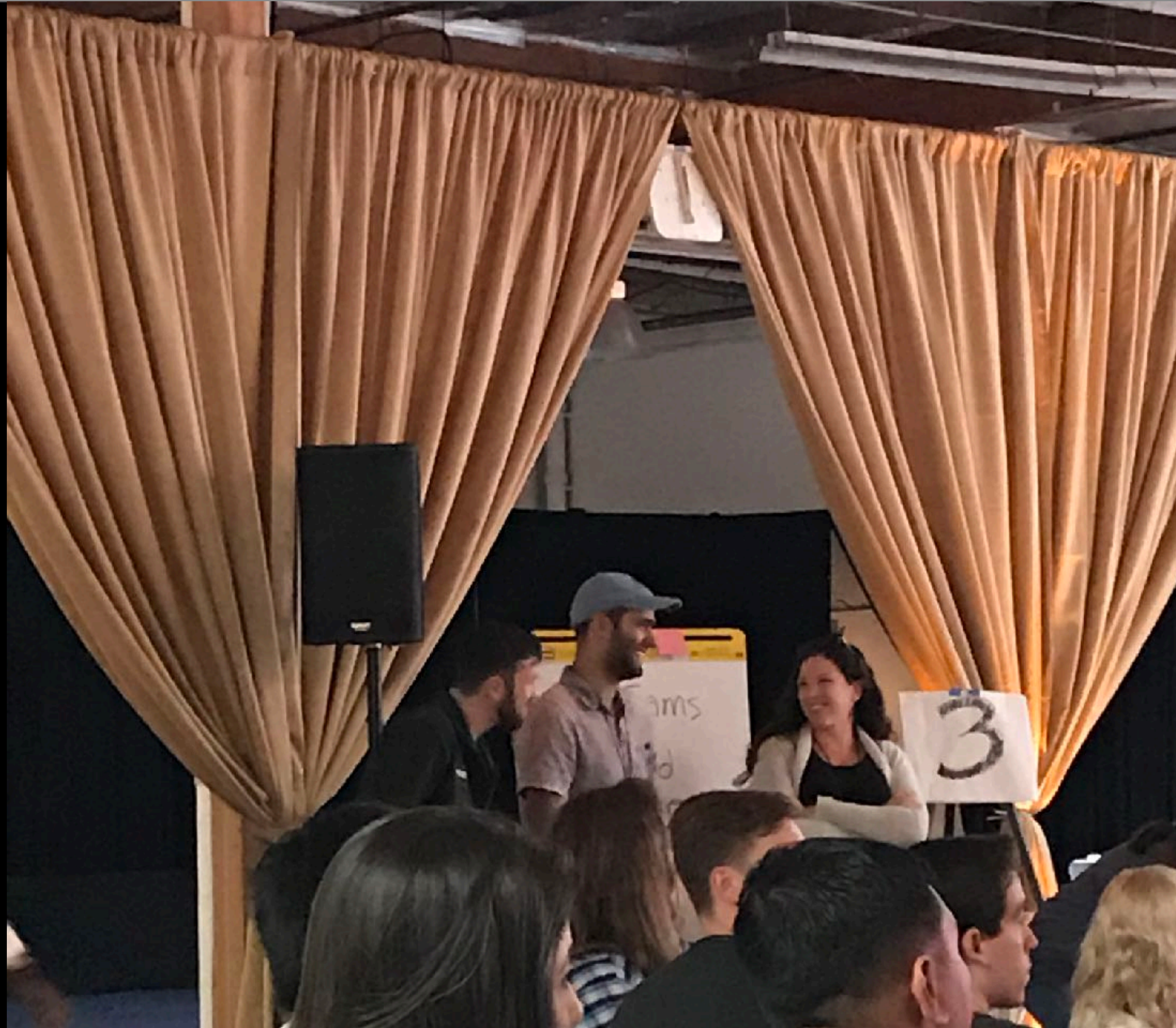


# CROWDSOURCE WHAT'S IMPORTANT TO THE WHOLE





# SELF-SELECTION RETEAMING: INVITE LEADERS





# KEEP GUILDS ALIVE AFTER EVENT



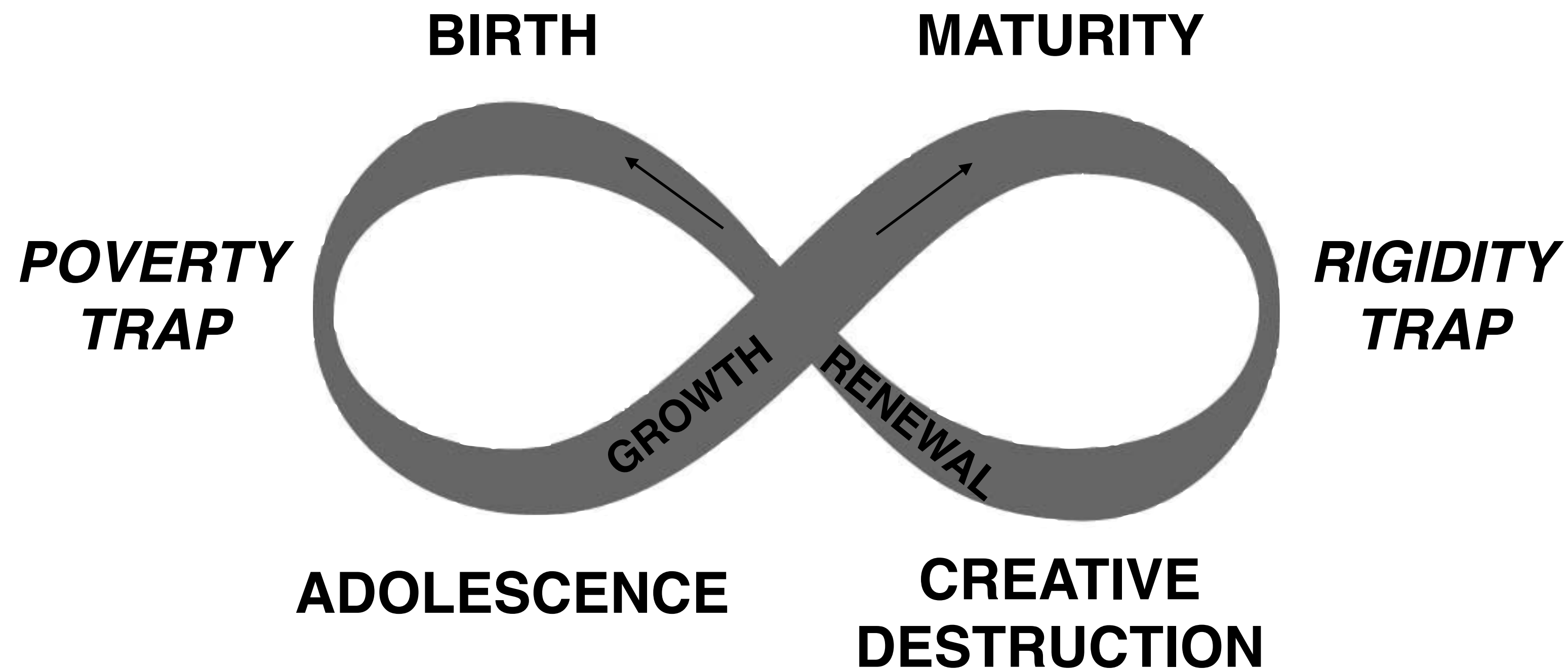


# **SELF-SELECTED GUILD FORMATION**

- **Open space to find improvement topics**
- **25/10 to crowdsource priorities**
- **People self-select to be leaders**
- **People self-select to join guilds**
- **Keep it alive after event**



# WHERE ARE YOU? YOUR TEAM? YOUR COMPANY?



Adapted from Gunderson and Holling, 2003  
Keith McCandless & Fisher Qua, Liberating Structures



**WHAT STORY WILL YOU WRITE?**







**It's all  
made up.**

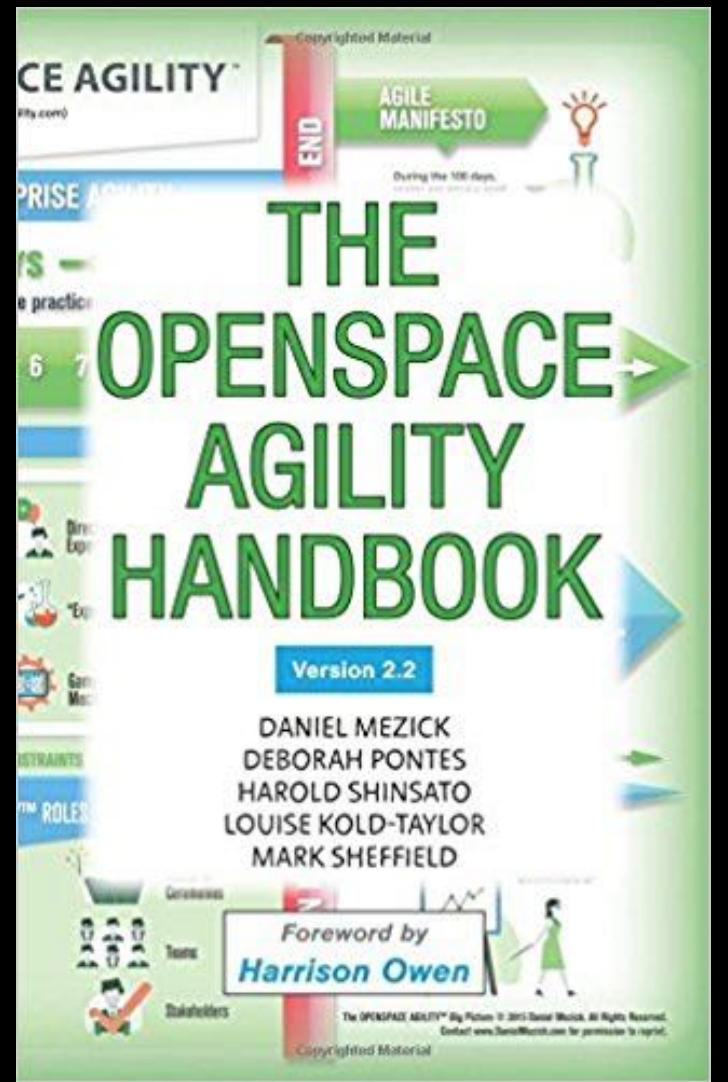
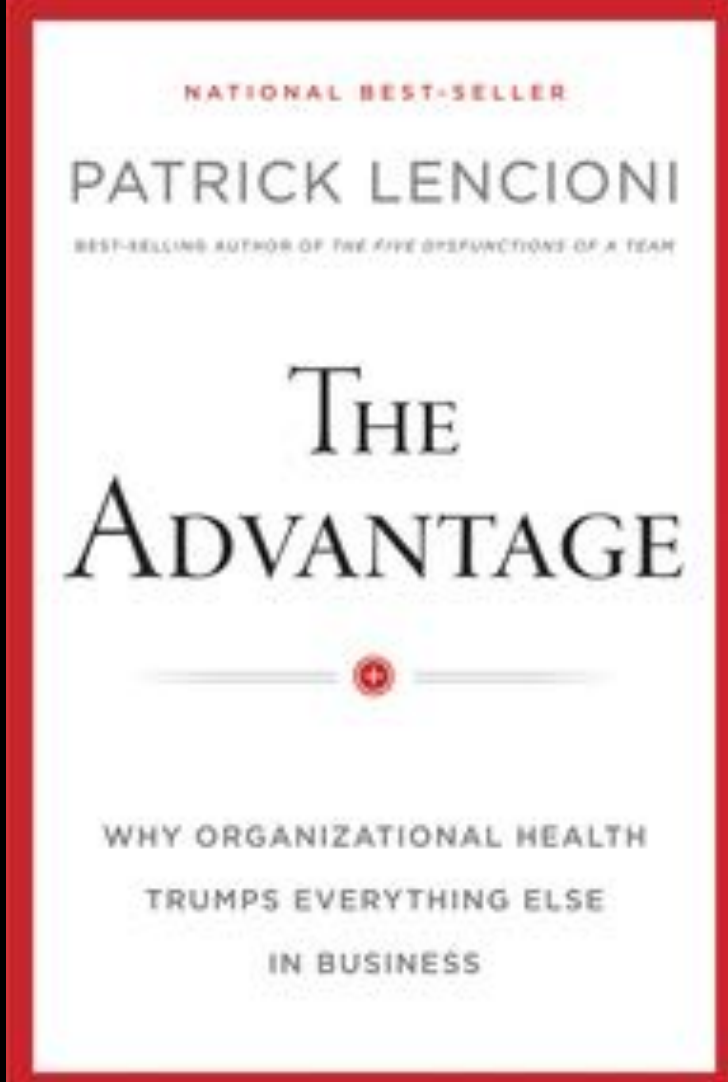
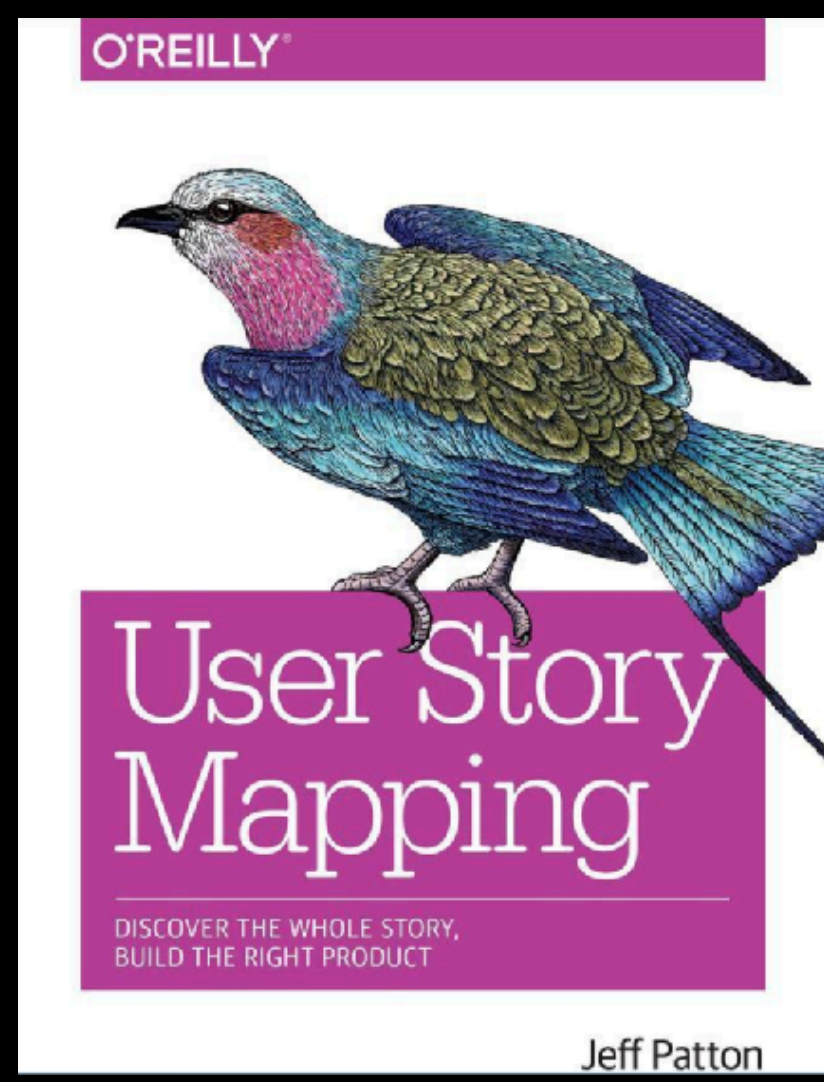
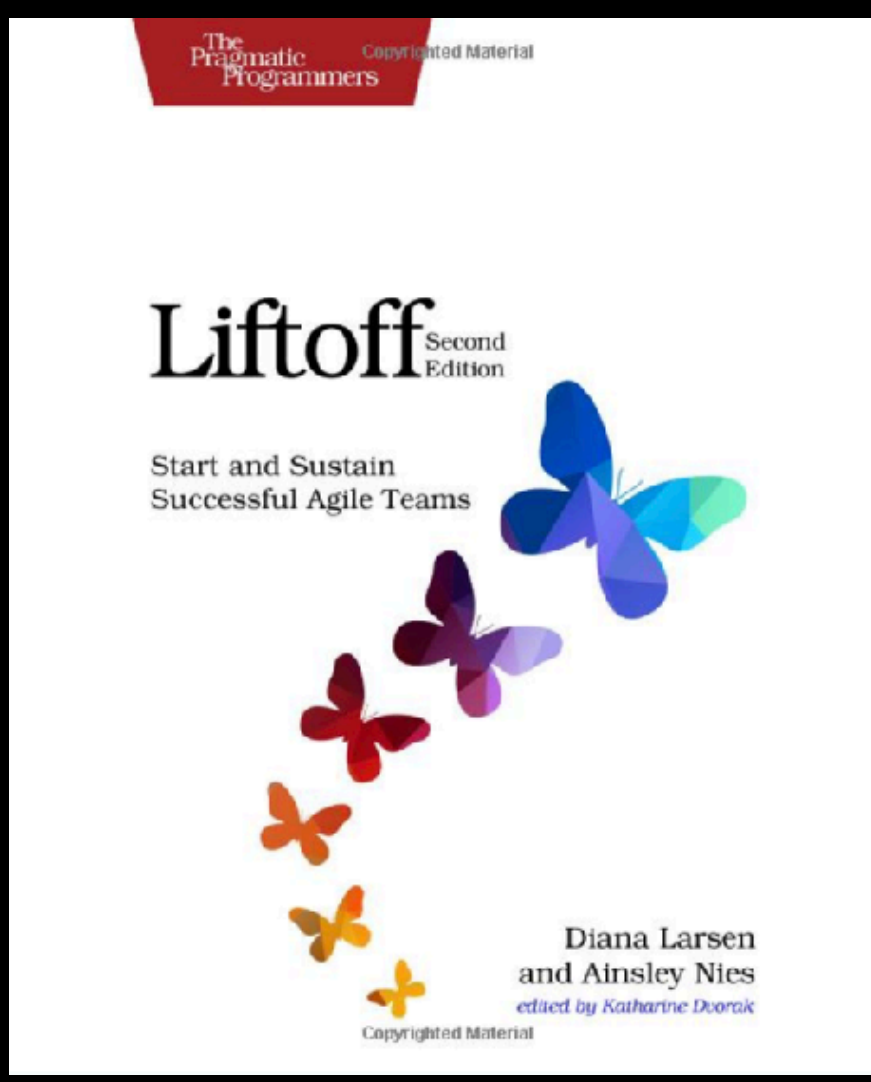
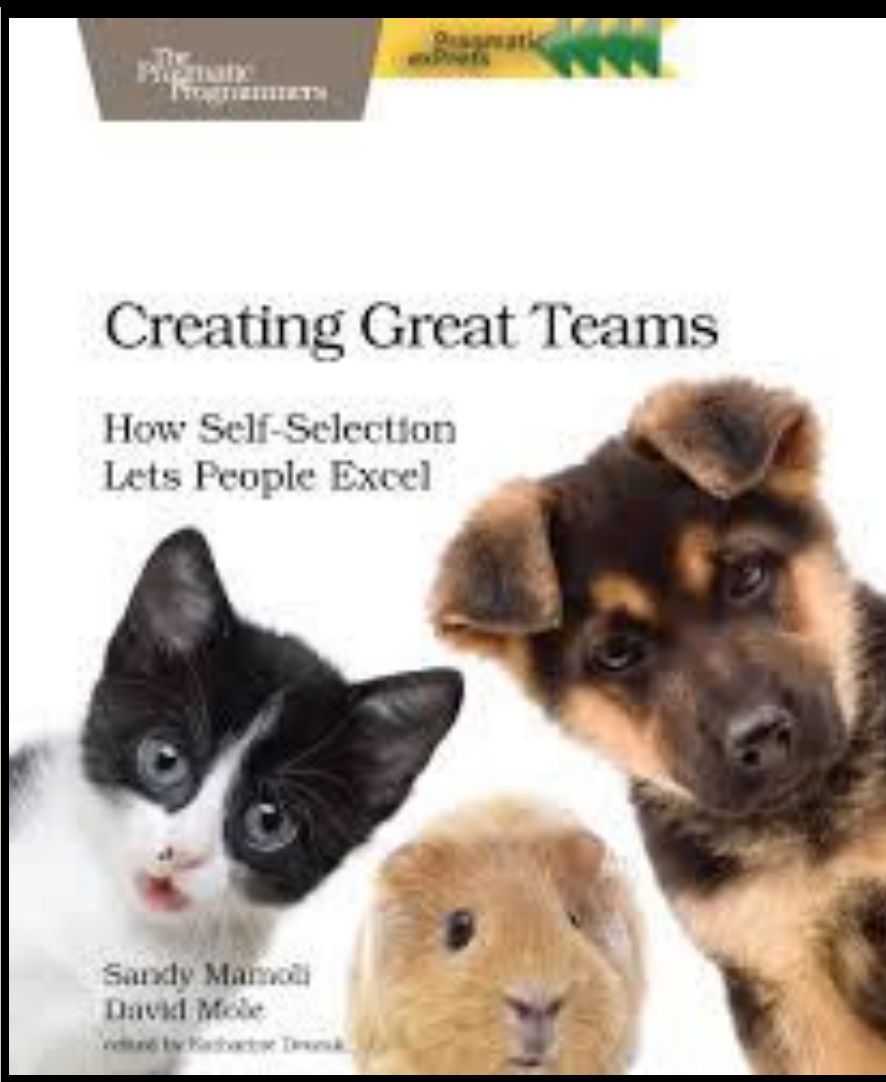
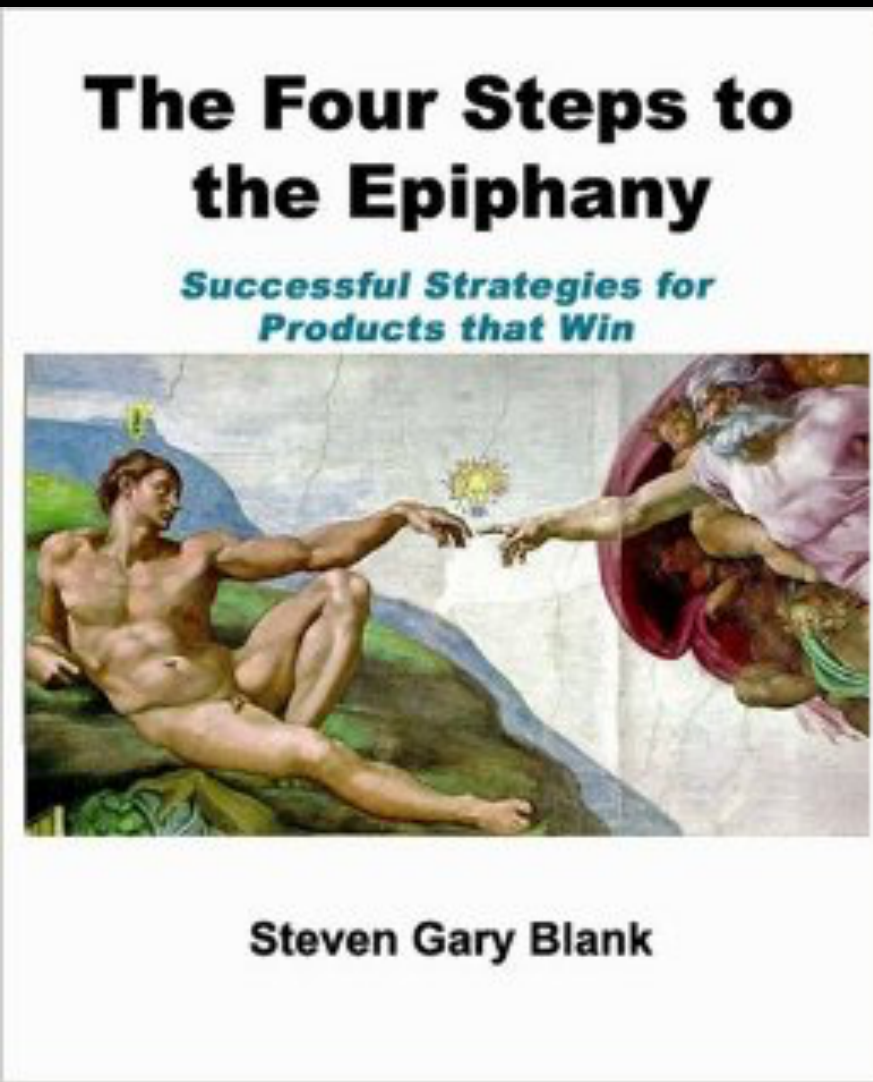
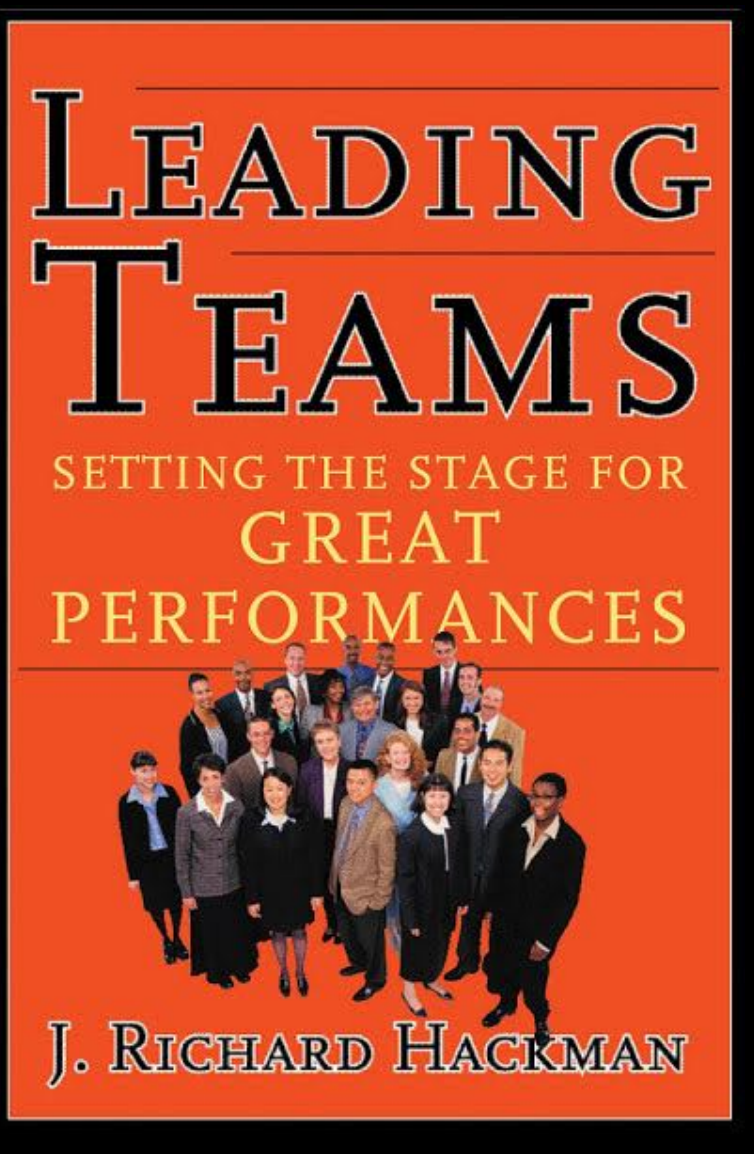
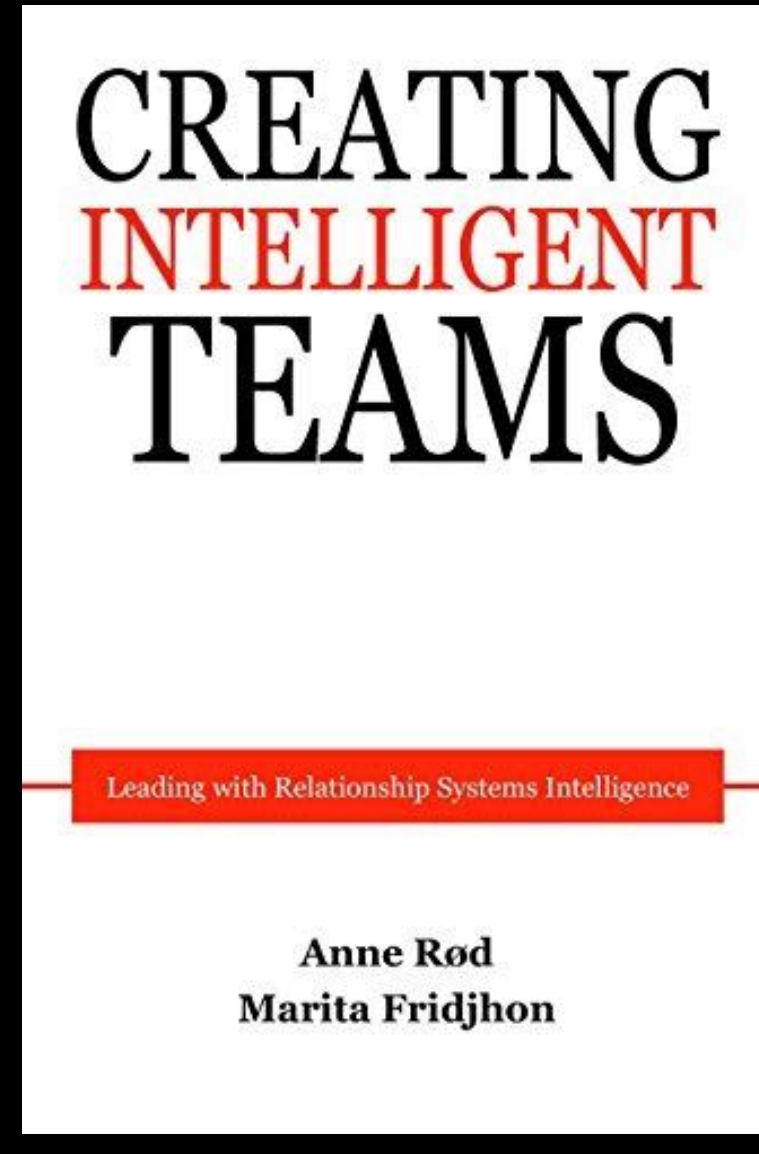
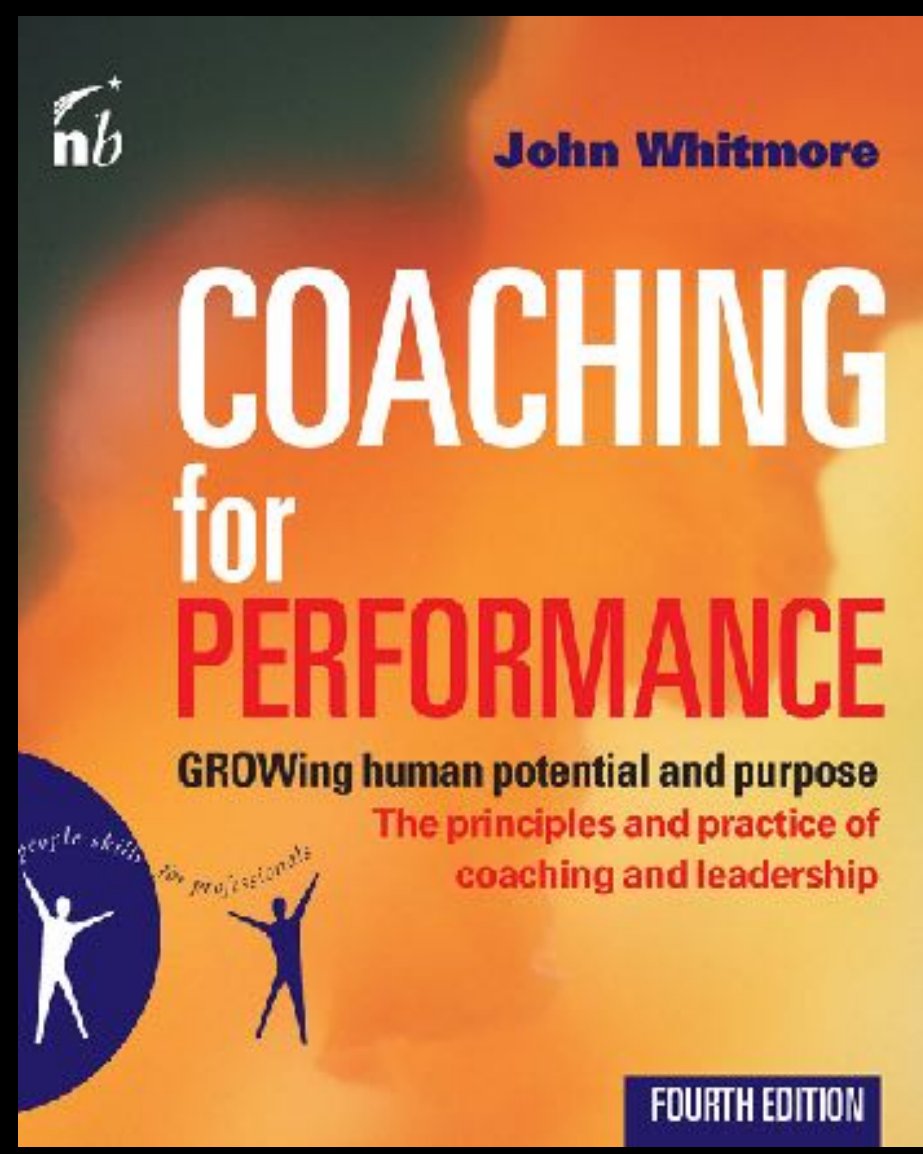
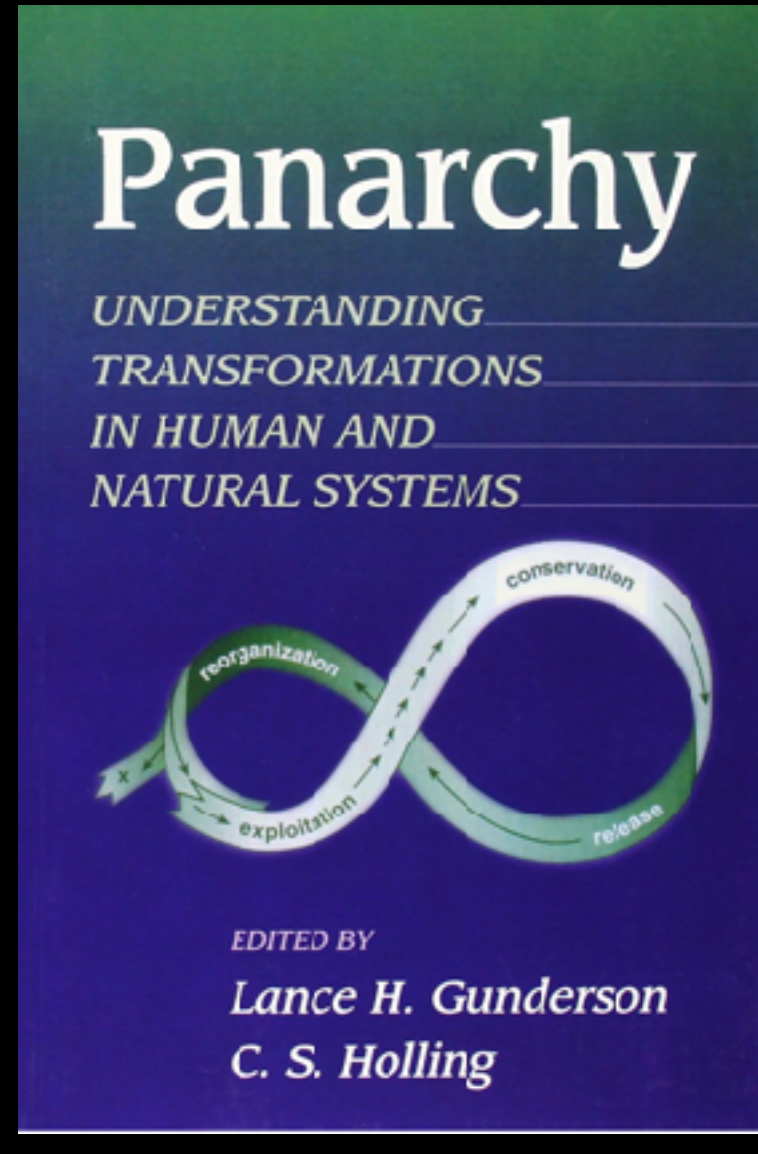
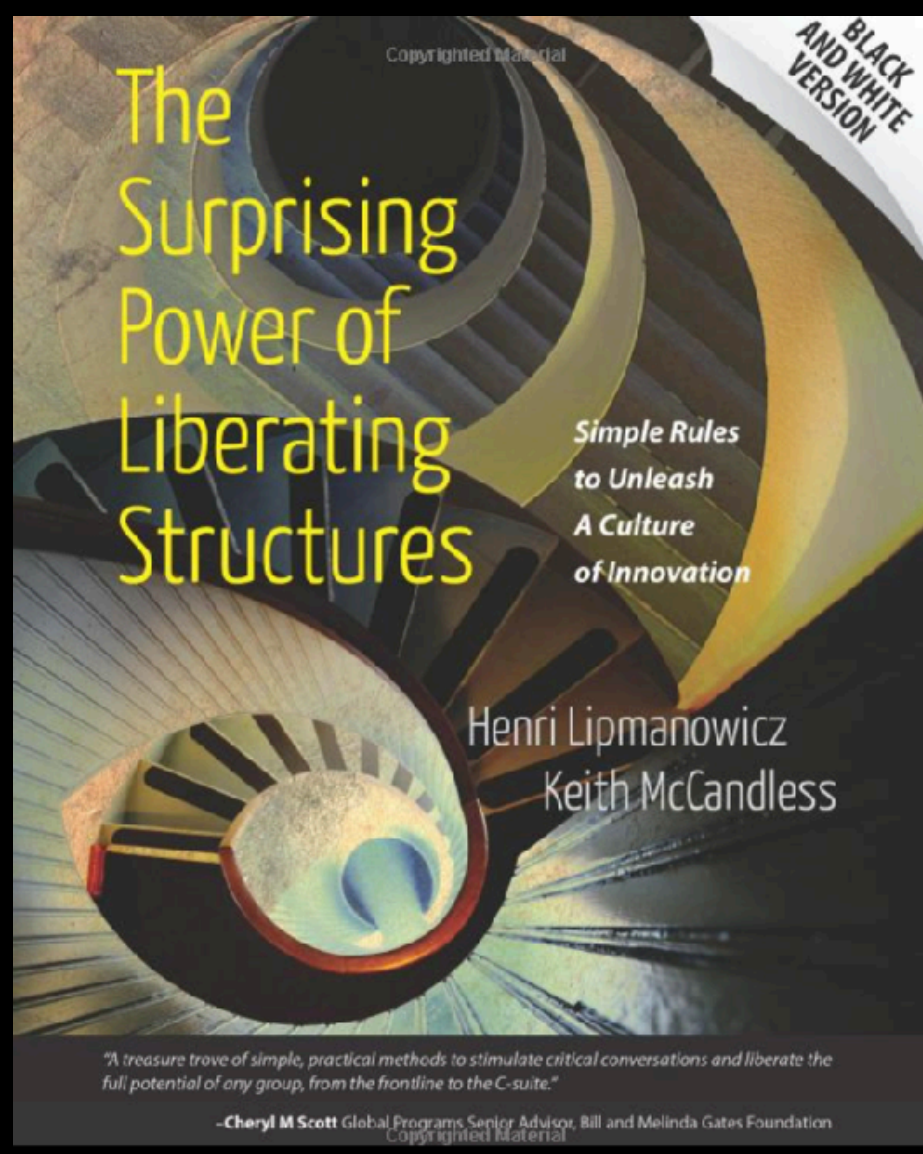
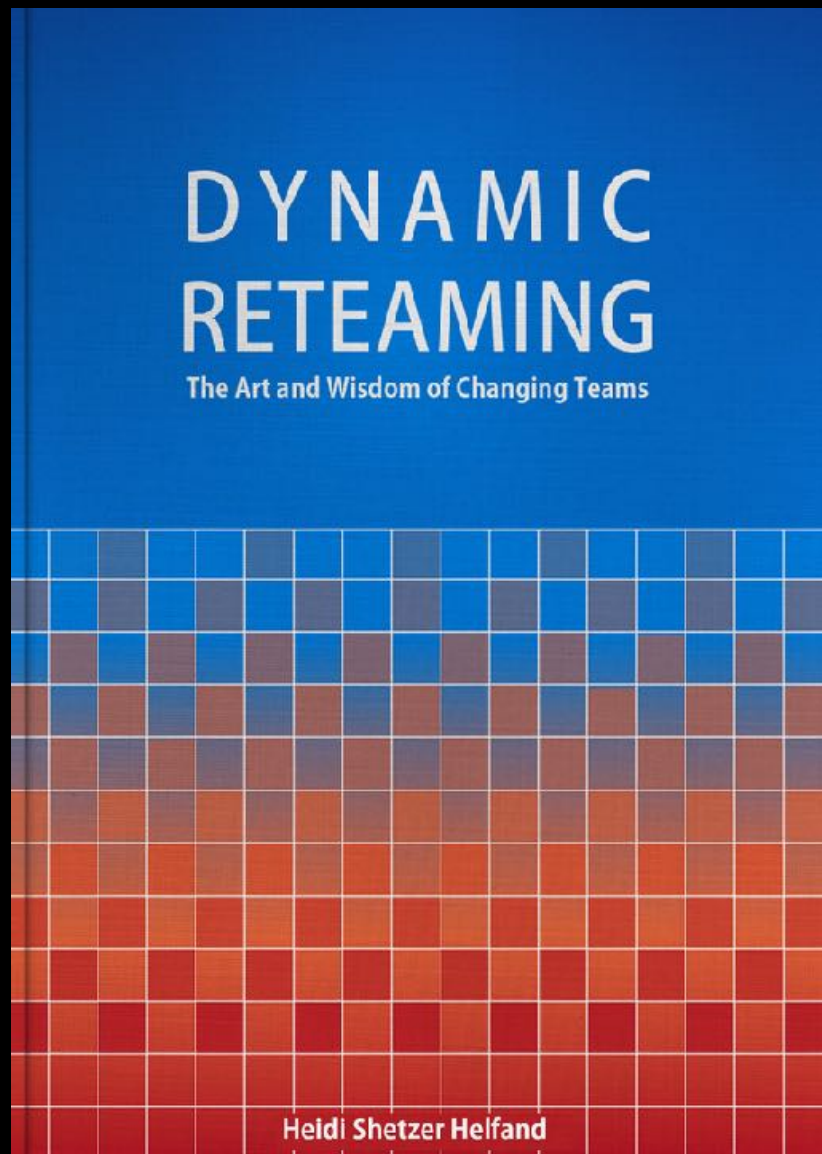
**-Rick Tamlyn**



# DYNAMIC RETEAMING

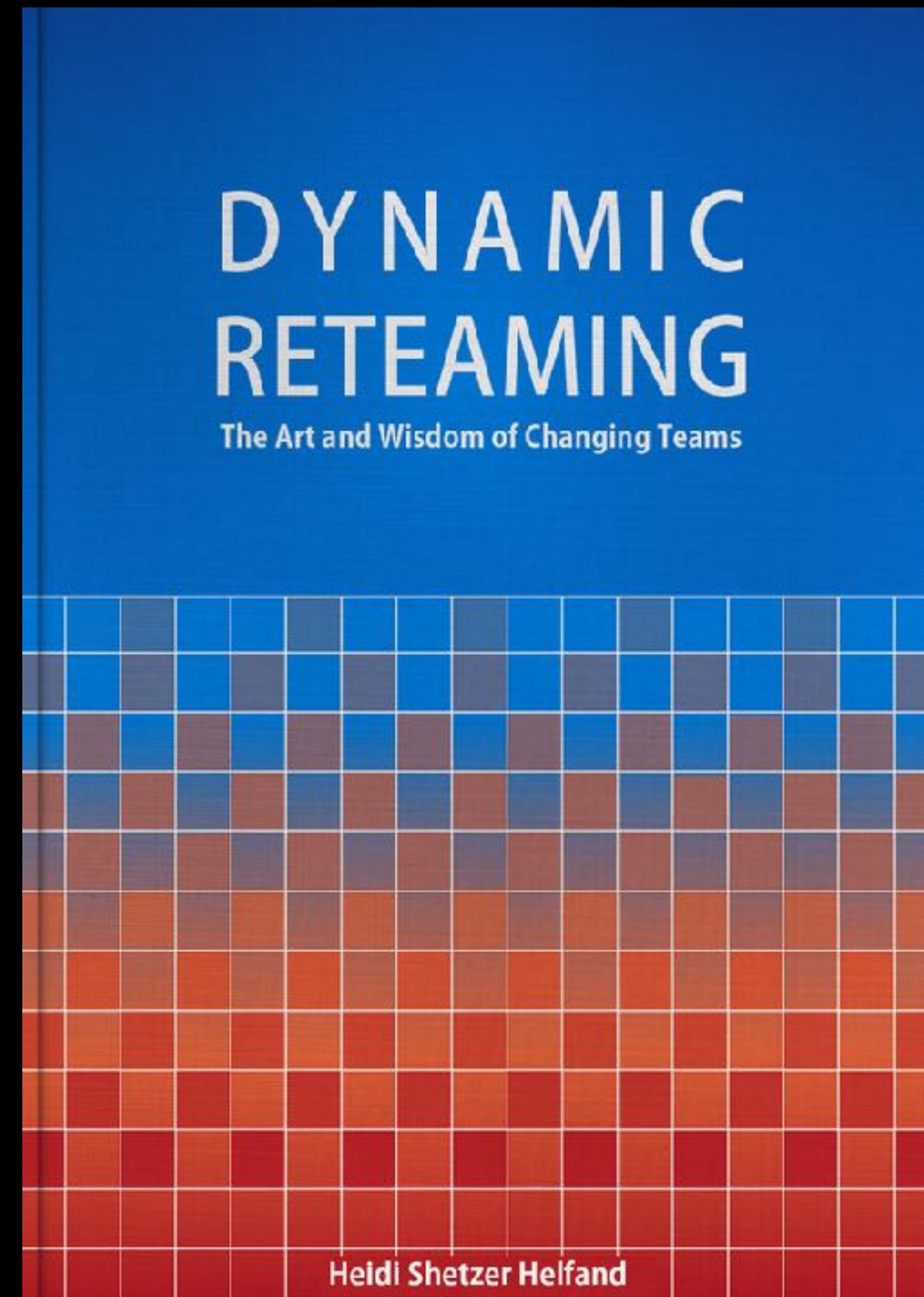
PROBLEM	PATTERN
Poverty trap, pivot or die	Innovation by isolation
Mandate to grow/double	One by one & batch addition
Duplication of mentor effort	Bootcamp
Relationships limited to teams	Network formation
Team-level rigidity traps	Grow & split
Knowledge Rigidity/Towers of knowledge	Pairing, mobbing, cross-team switching
Individual-level rigidity traps/stagnation	Opportunity matching/whiteboarding
Multi-team rigidity traps/stagnation	Self-selection events/whiteboarding
“Fast growth” - who are these people?	Self-selected guild formation







[LEANPUB.COM/  
DYNAMICRETEAMING](http://LEANPUB.COM/DYNAMICRETEAMING)





# DYNAMIC RETEAMING

*AT FAST-GROWING COMPANIES*



AGILE &  
BEYOND

HEIDI HELFAND

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