

# DYNAMIC RETEAMING

*AT FAST-GROWING COMPANIES*

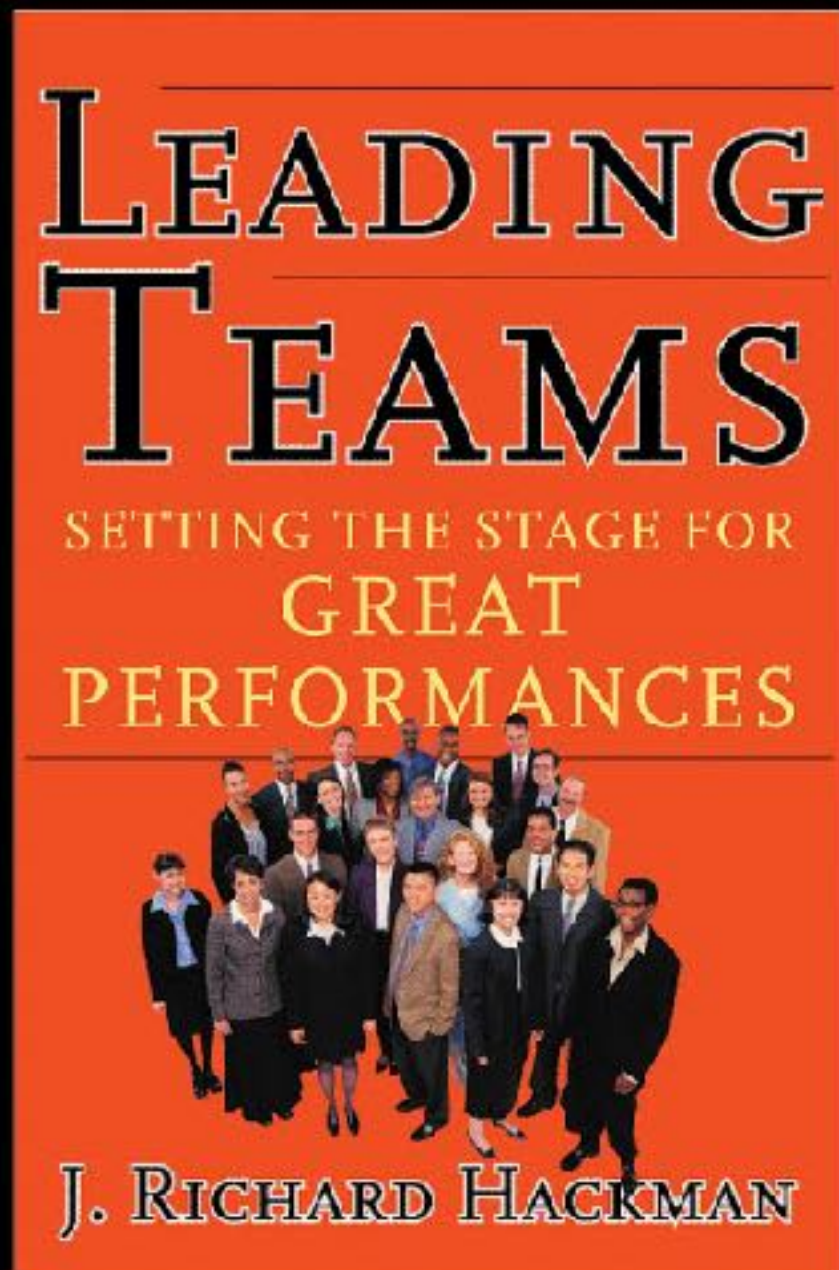


**HEIDI HELFAND**

DIRECTOR, ENGINEERING EXCELLENCE

[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.”

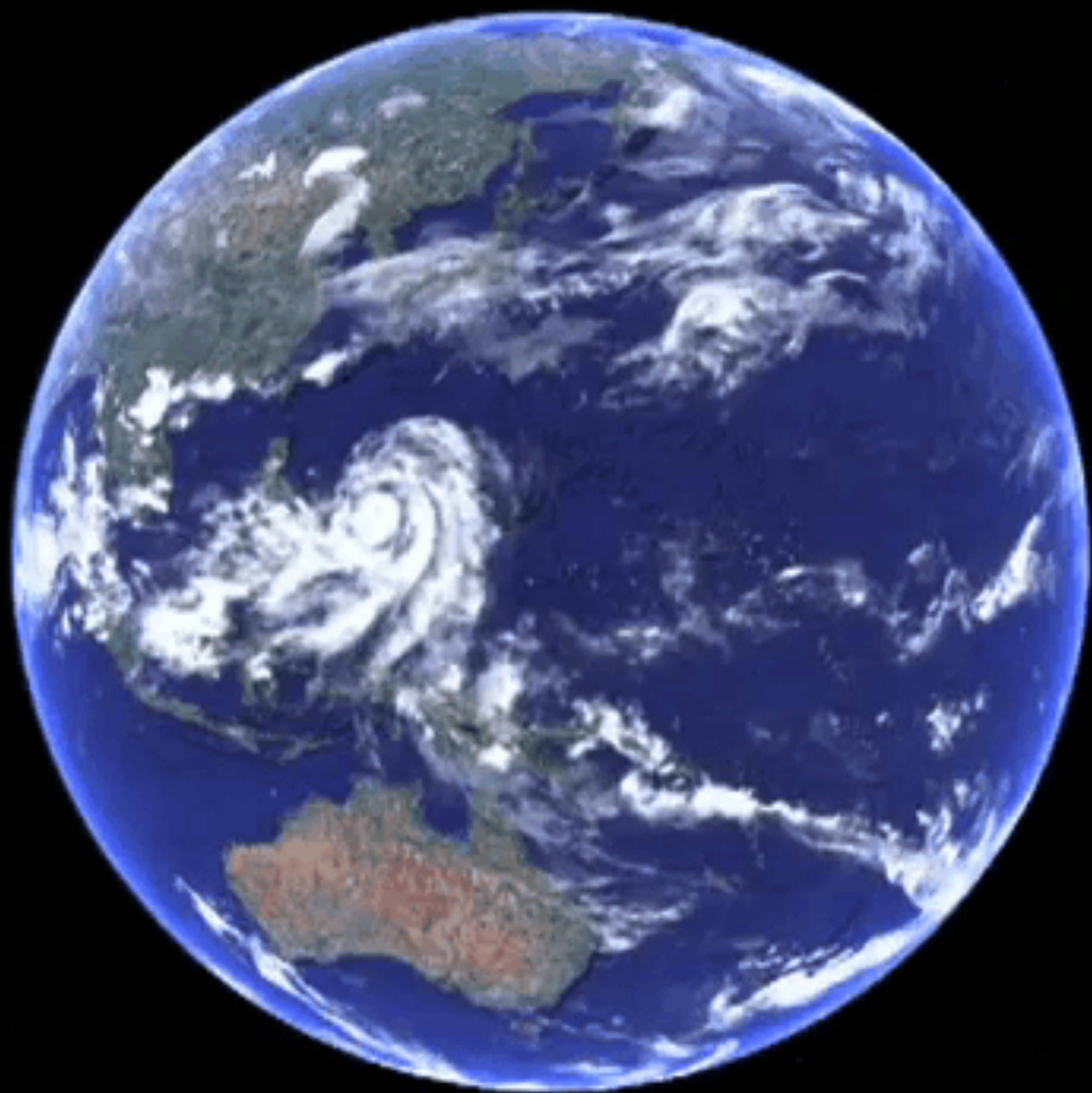


**“Keep teams stable for predictability”**  
**-Scrum PLoP**



Kai Schreiber, Nao robot demo, Jaume University.







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

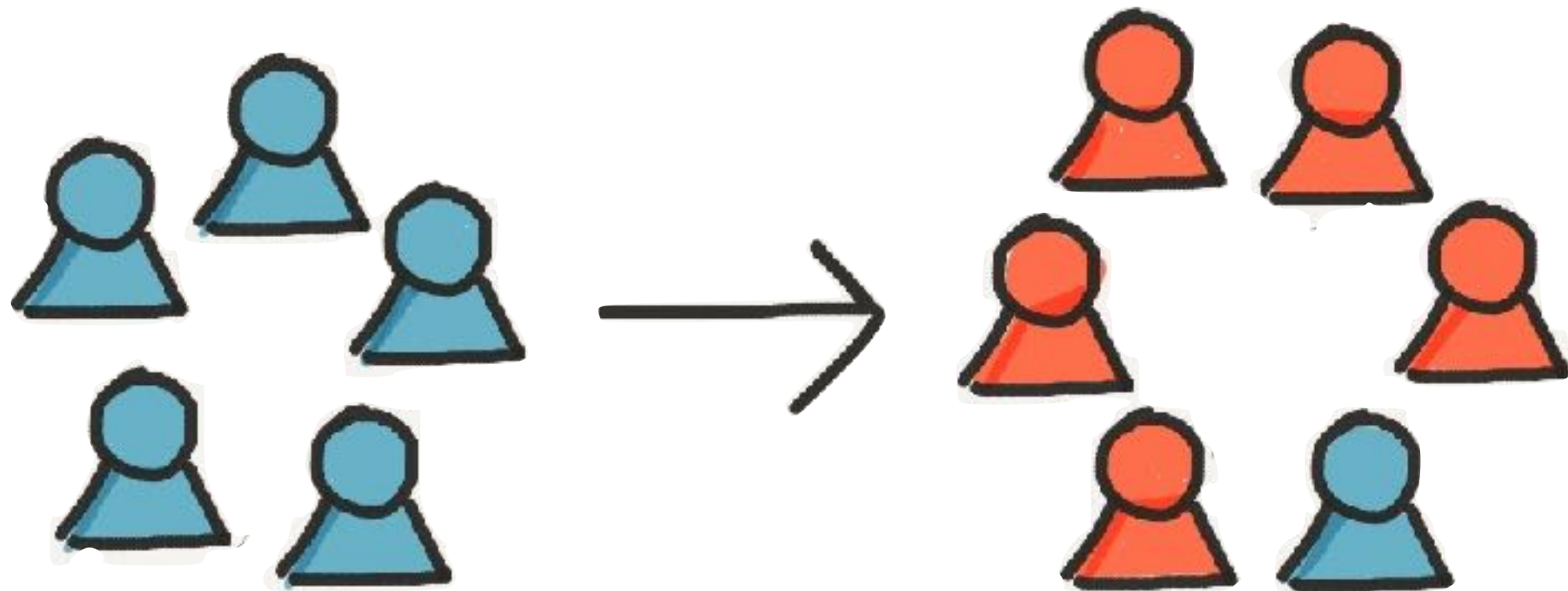
**STAND UP IF...**



**TEAM CHANGE IS  
INEVITABLE.**

**GET GOOD AT IT.**

# IT ONLY TAKES 1 PERSON





# ONE PERSON CHANGES THE DYNAMIC



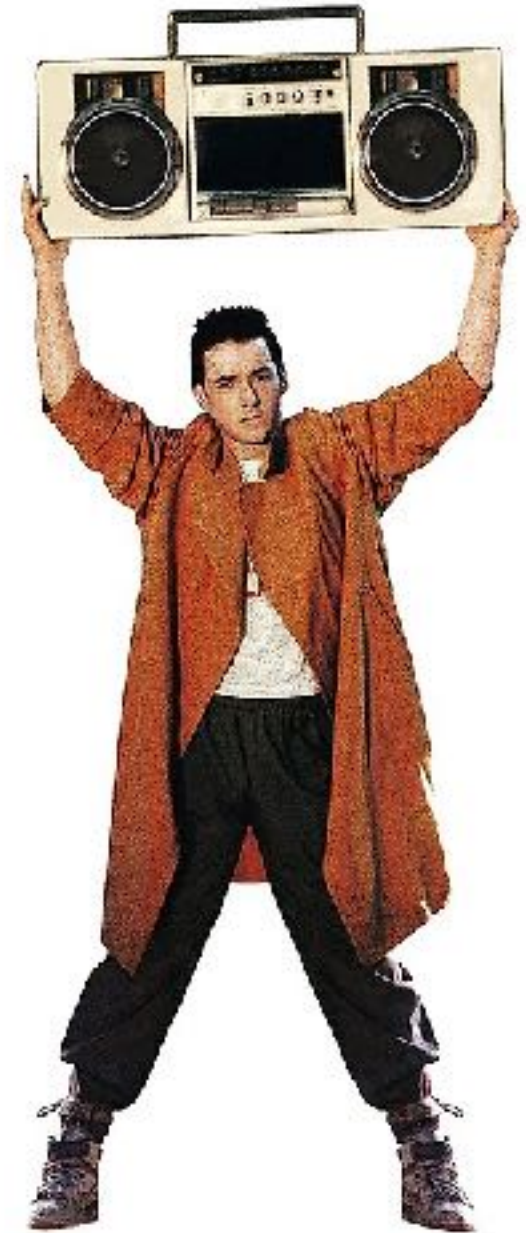


# WE MIGHT GROW FAST





# AMPLIFY TEAM CHANGE





# MULTIPLE PEOPLE START TOGETHER



**PROCORE®**



# GLOBAL EXPANSION



**PROCORE®**



**PROCORE**







WE CAN GET GOOD AT IT

**PROCORE**<sup>®</sup>



# PEOPLE WILL LEAVE





# IT CAN BE GUT WRENCHING





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





**Long running  
teams are the  
best!**

**Teams need  
time to gel!**

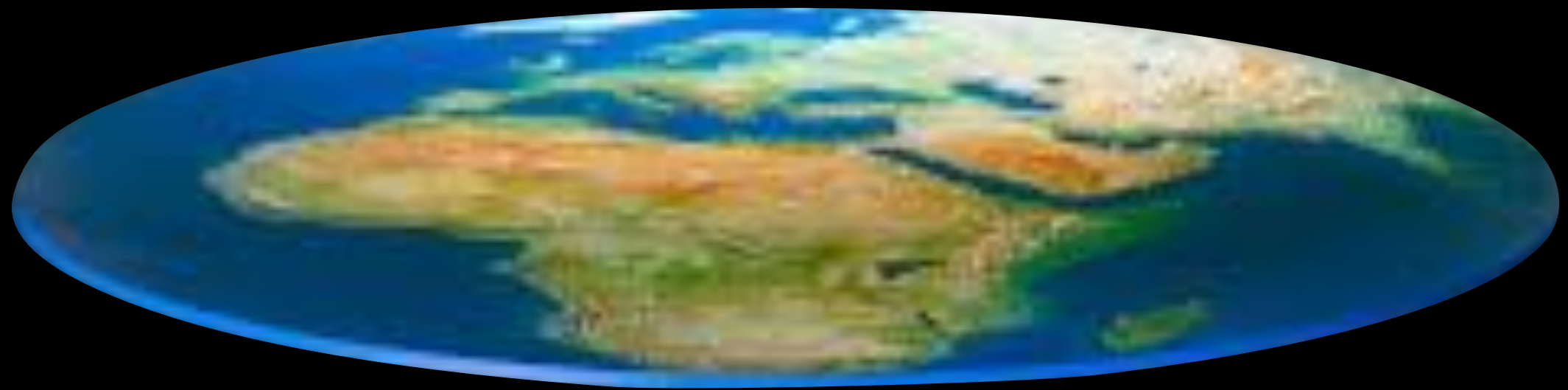
**Forming  
Storming  
Norming  
Performing!**

**Your  
velocity will  
go down!**

**Keep  
teams the  
same!**

**You'll lose  
predictability!**





WHEN YOUR TEAMS  
CHANGE ARE YOU  
DOING IT WRONG?



FROM 15 TO 700



GoToMeeting



GoToWebinar





Acquired Expertcity -  
2003

**\$225 million dollars.**



Acquired Citrix

GoToMeeting - 2017

**\$1.8 Billion.**



# FROM 10 TO 600







@ppfolio™





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





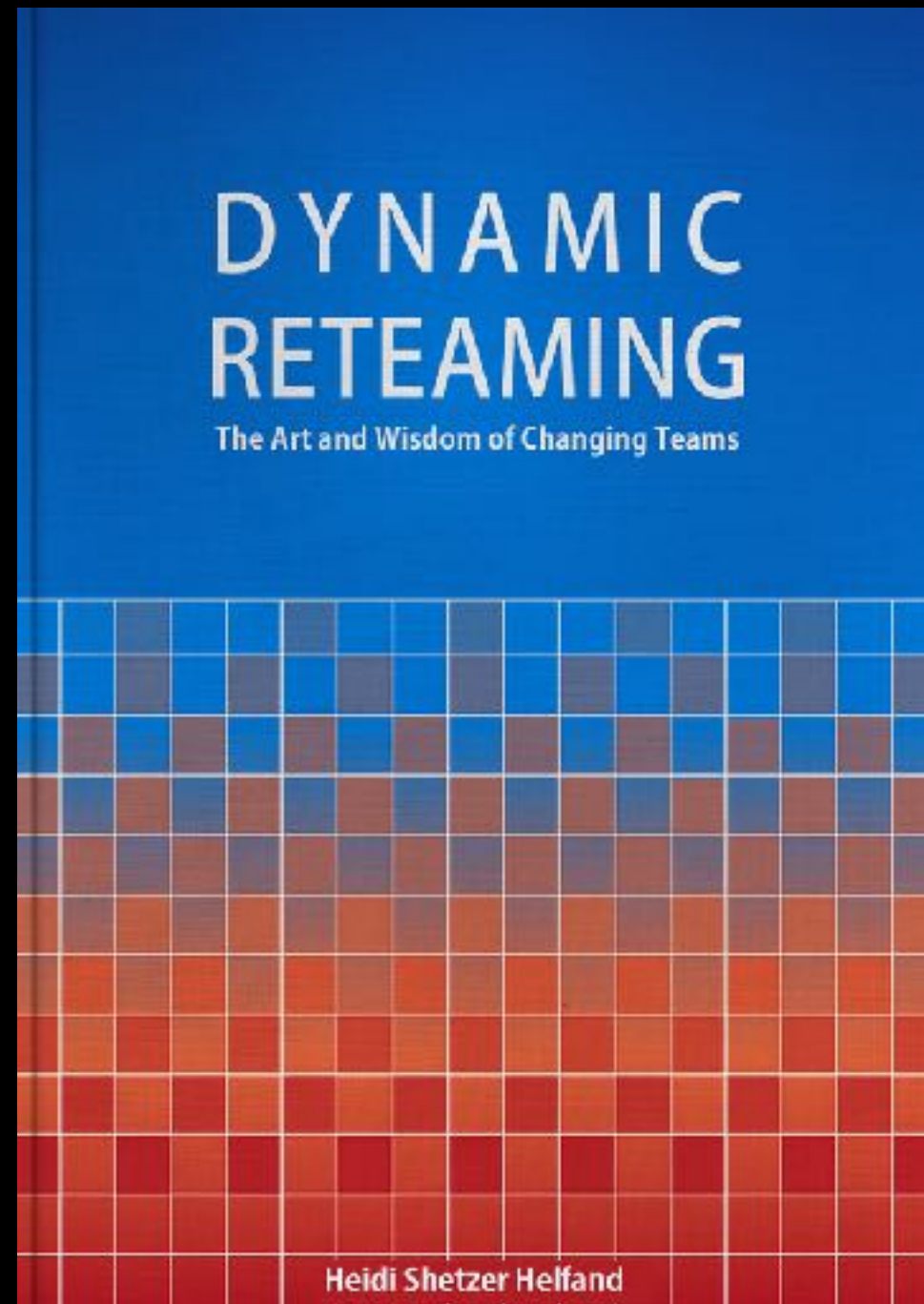
# HEIDI HELFAND

## DIRECTOR OF ENGINEERING EXCELLENCE

[HEIDIHELFAND.COM](http://HEIDIHELFAND.COM) @HEIDIHELFAND







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

**DYNAMIC**

**RETEAMING IS TEAM**

**CHANGE**



# IMPROMPTU NETWORKING

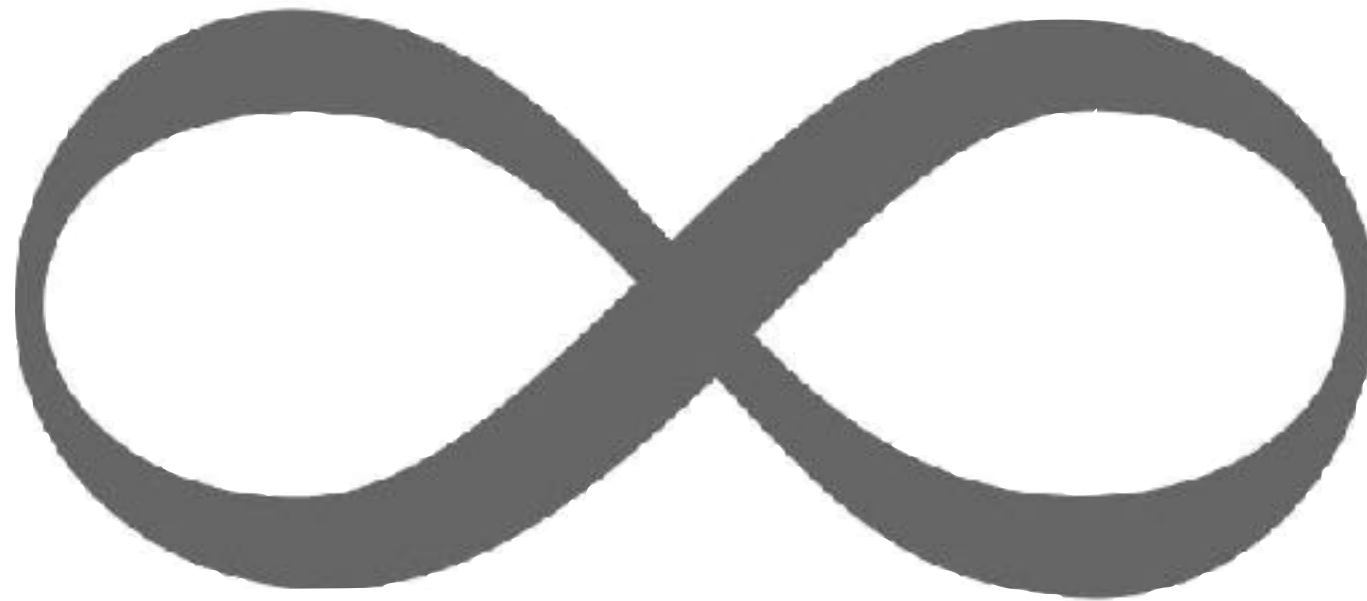


What is your  
experience with team  
change? What was it  
like?



# ECOCYCLE TOOL

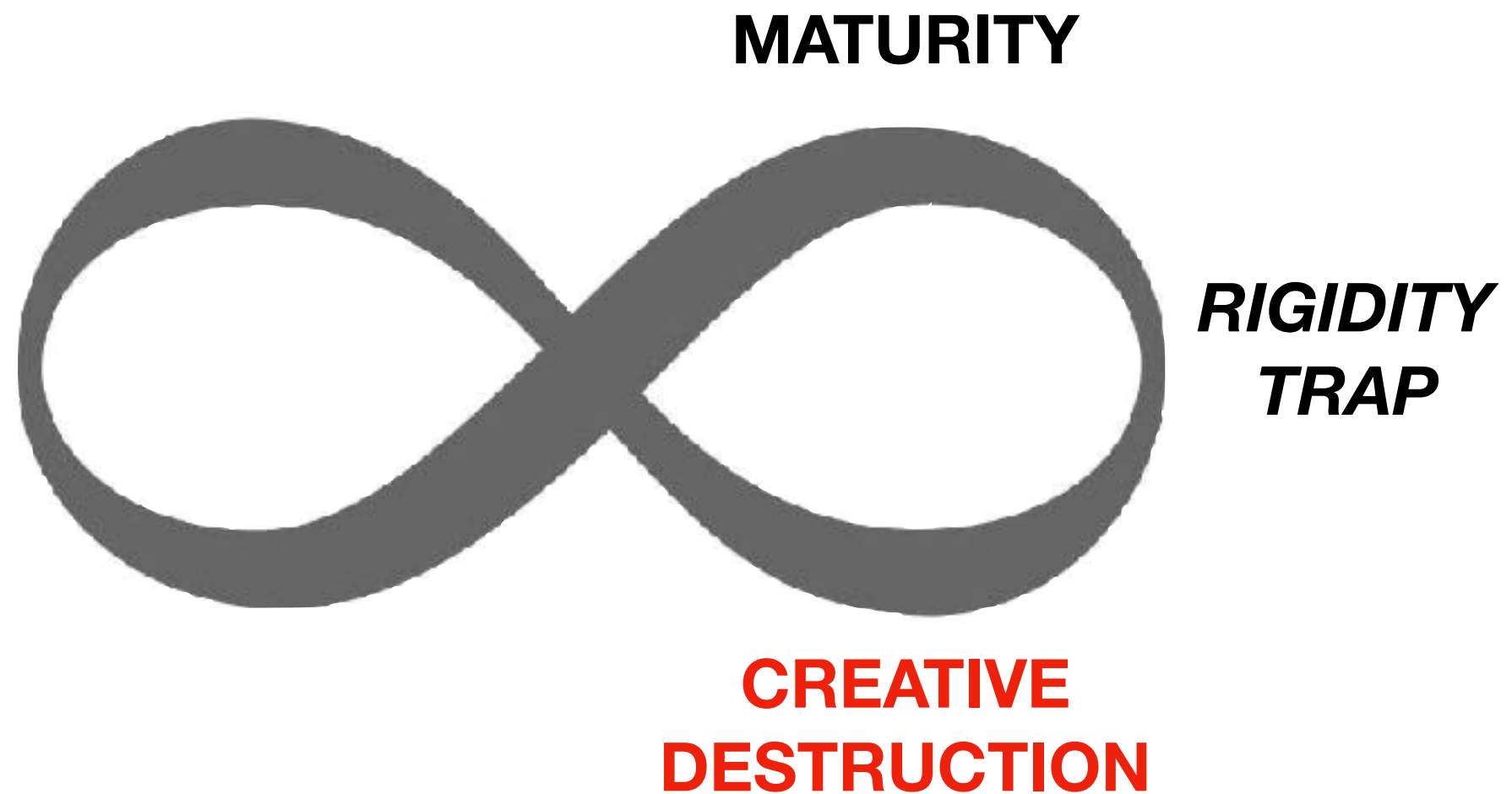
**MATURITY**



***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**

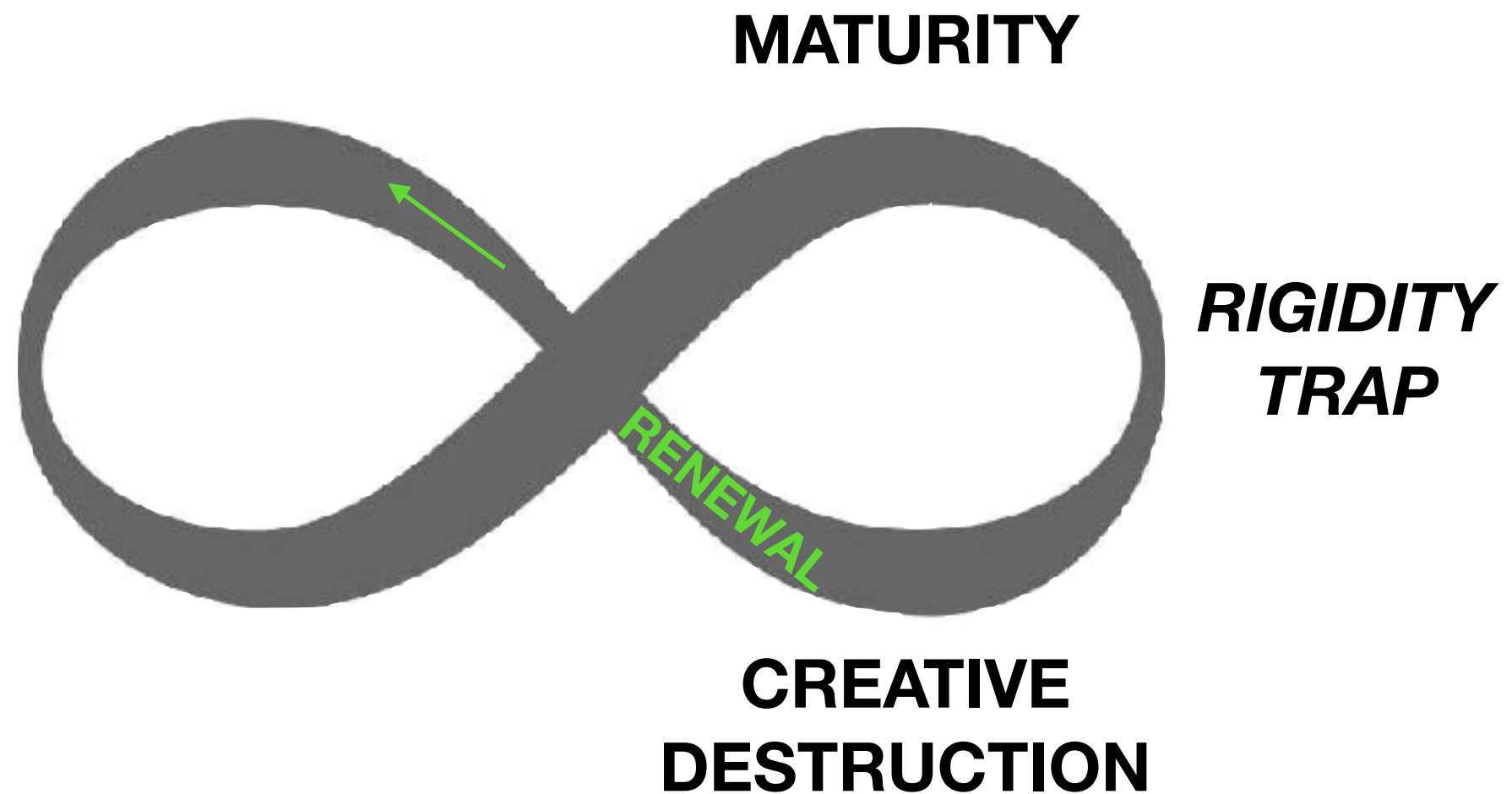


***RIGIDITY  
TRAP***

**CREATIVE  
DESTRUCTION**

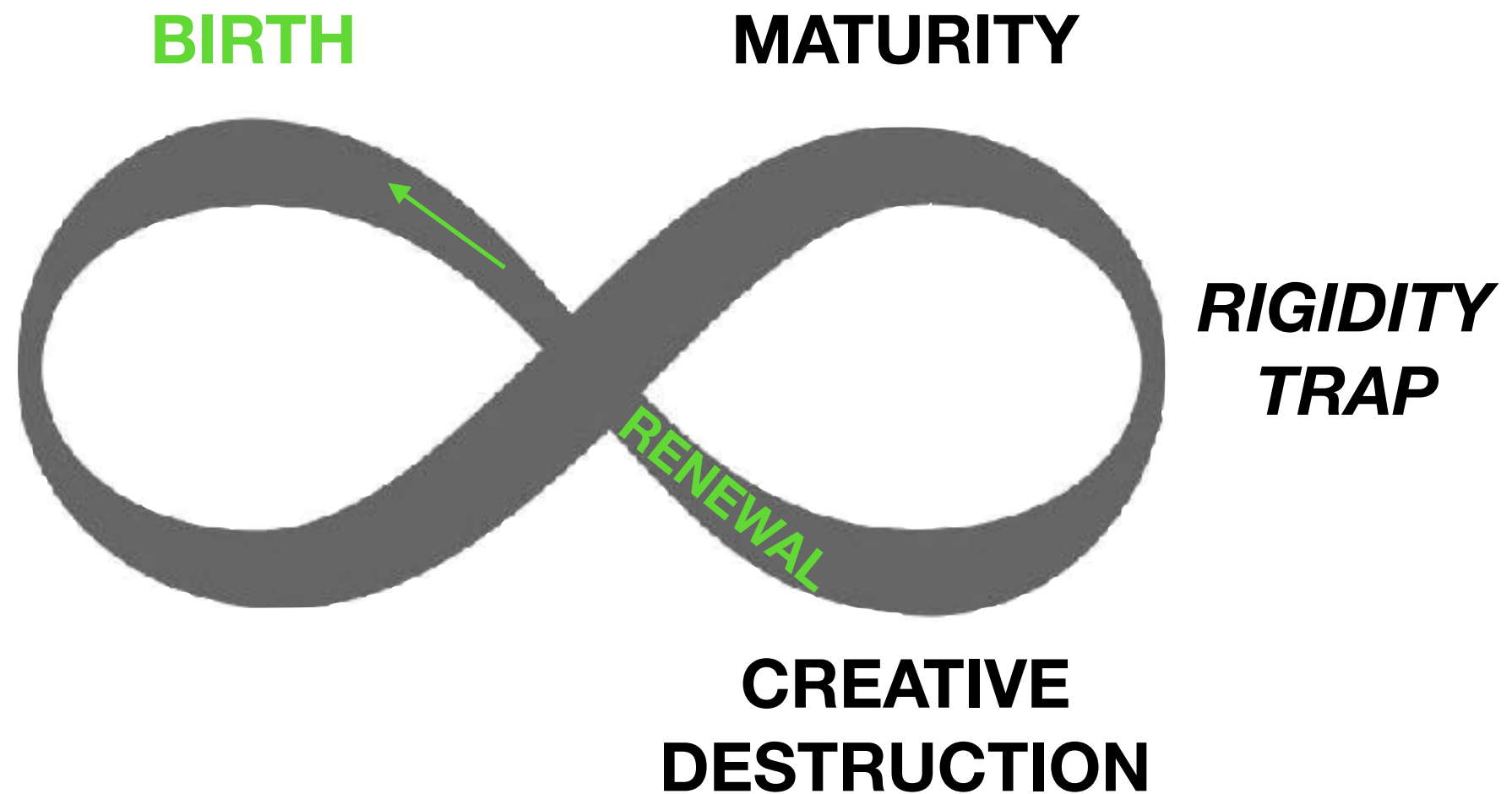
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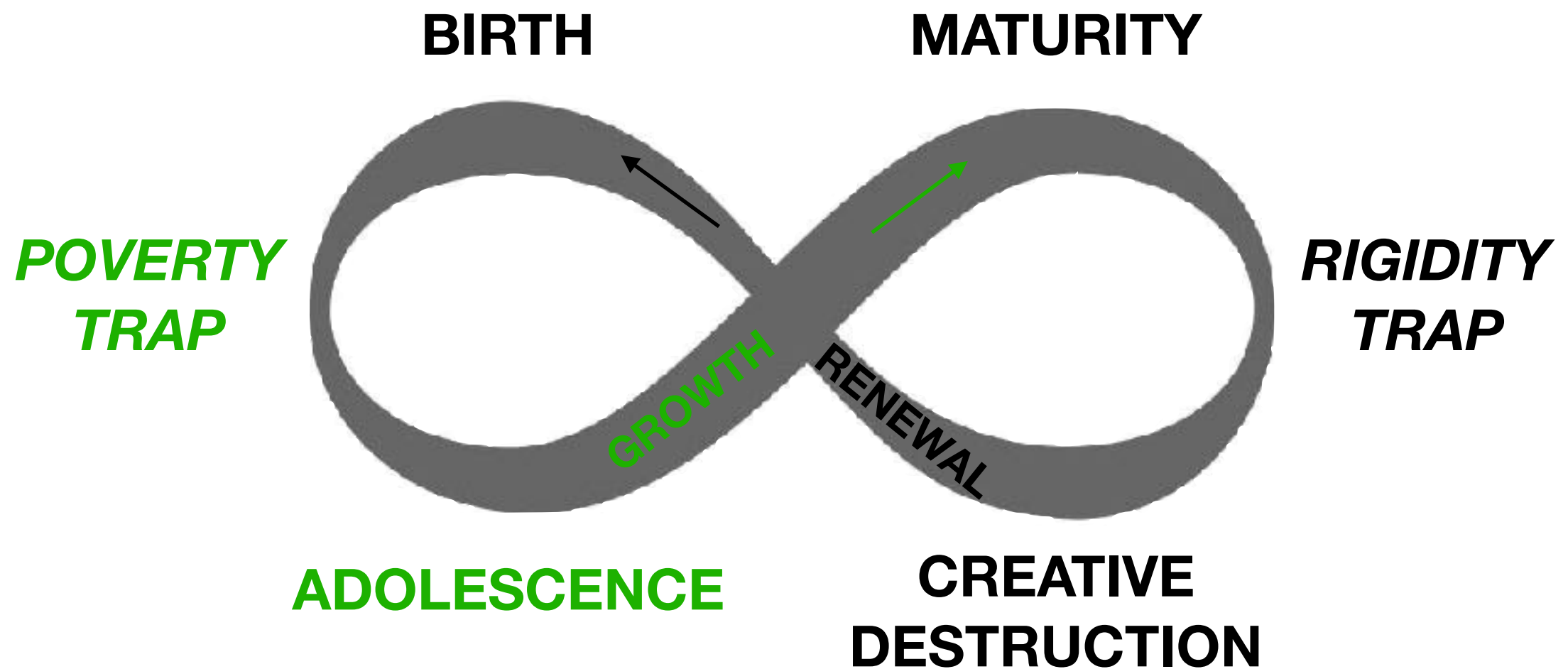
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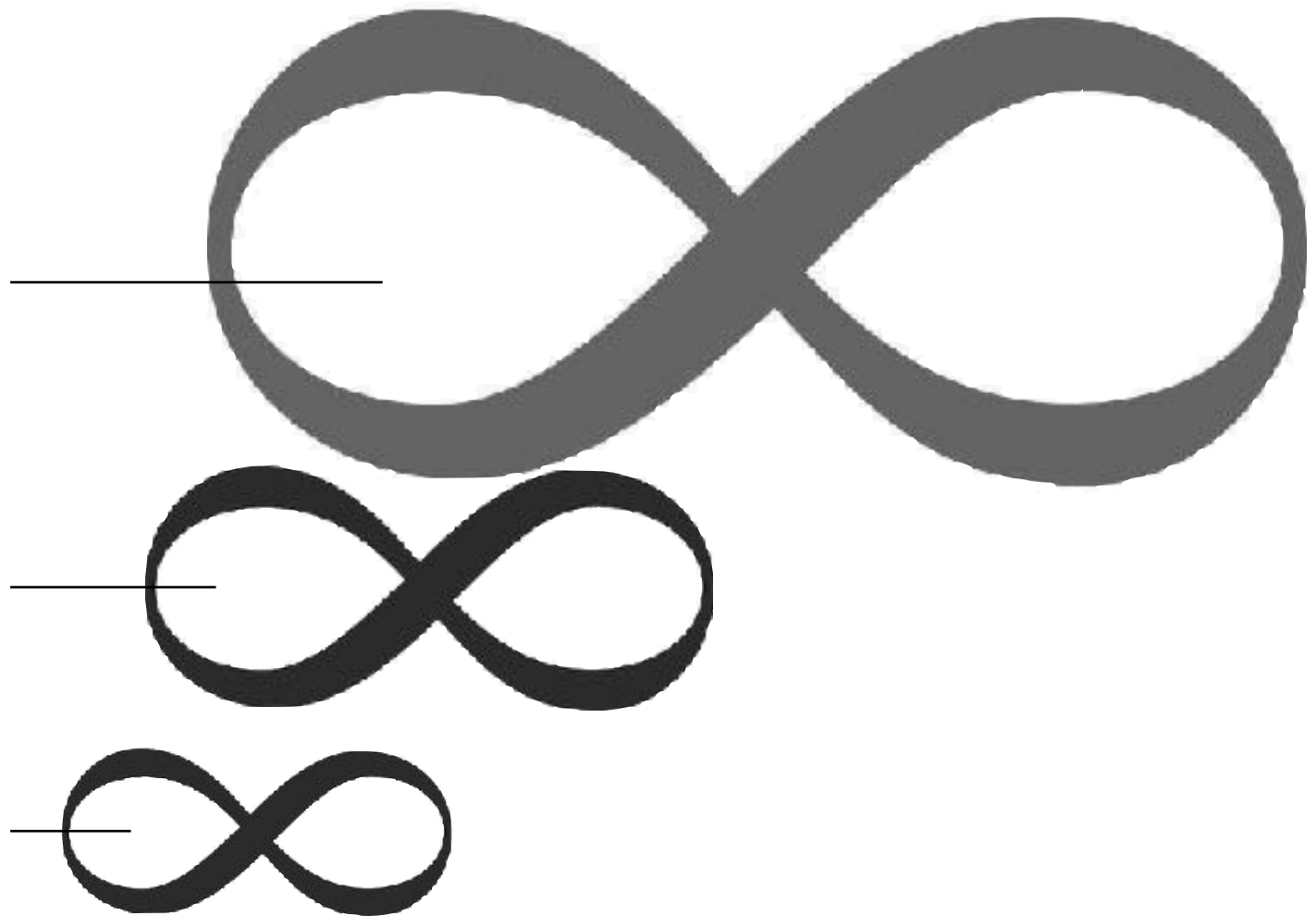


# Panarchy

**Forest**

**Tree**

**Leaf**



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



# Case Study 1: Expertcity



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> ★★★★★ 1692 Sessions	Now    	Mail merges are really quite simple once you've been shown properly by an expert. I'd be happy to show you... \$10.00 Est. 15 min ✓ Select Expert View Resumé Send Email Request Chat
 <u>Cindy L.</u> ★★★★★ 1098 Sessions	About 20 min  	I am MCSE and Brainb... adept at performing Ma... \$5.00 Est. 10 min Select Expert
 <u>Josh S.</u> New expert 10 Sessions	About 5 min  	I'm certified by Microsoft and can demonstrate that for you :-) \$8.00 Est. 10 min Select Expert
 Chris K	Possibly	If you're publishing for a large audience,

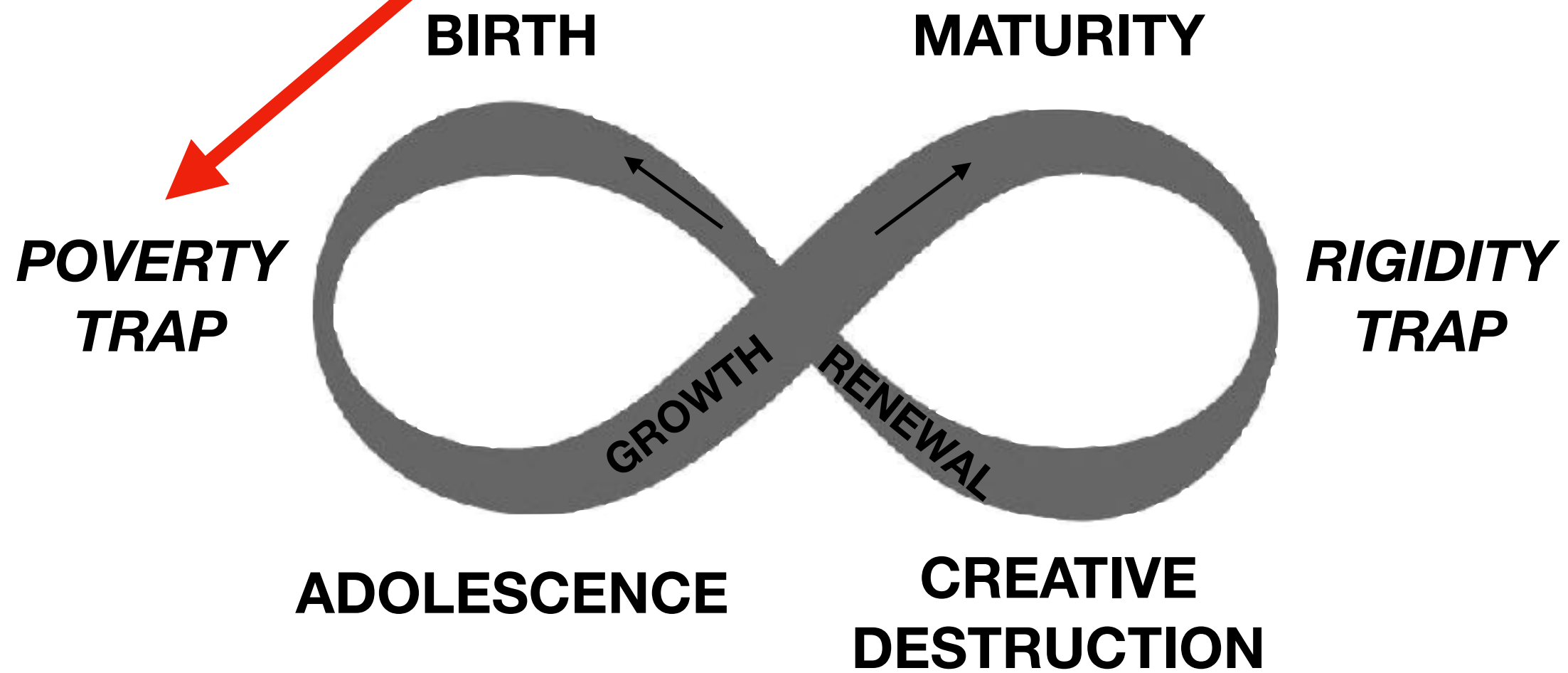




Andrew  
Phipps  
Crispin  
Snyder

'00 3 14





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



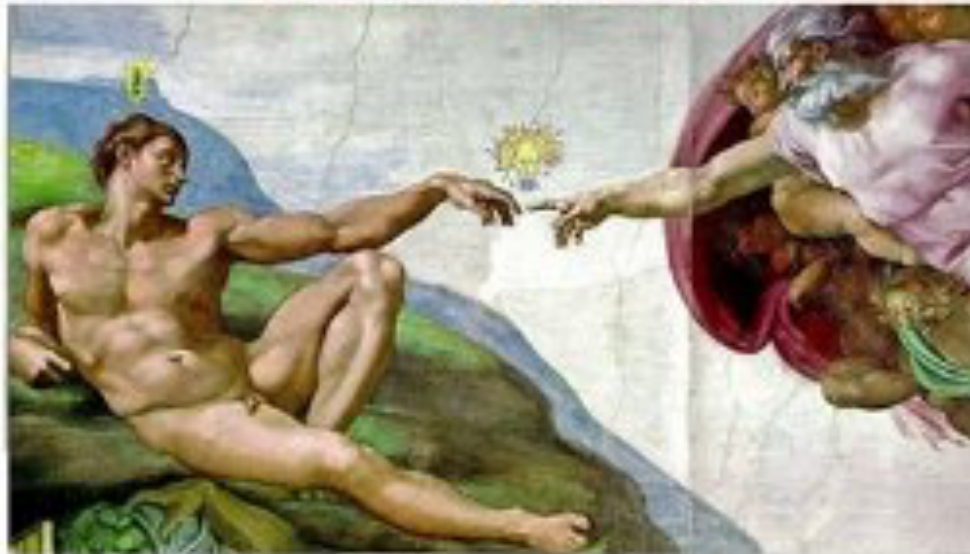
“...People loved the screen-sharing...no one wanted to pay for tech support...the \$10 million lesson? **Do market validation!**”

-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**

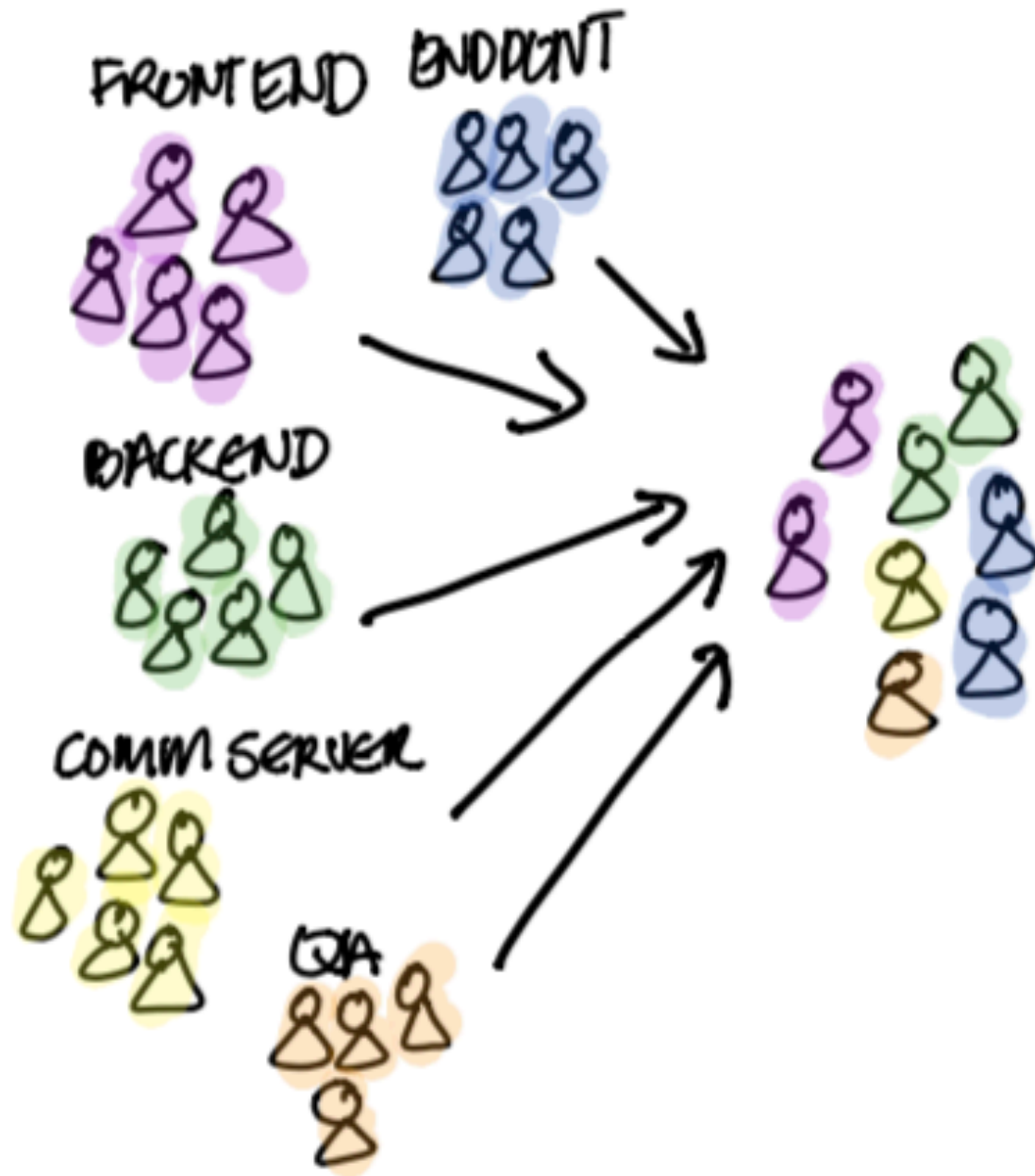
The Step-by-Step Guide for  
Building a Great Company



**Steve Blank and Bob Dorf**



# Isolation Reteaming Pattern



- **Form team**
- **Isolate team**
- **Give process freedom**



GoToMyPC®





# FORM, ISOLATE, DISSOLVE

**BIRTH**

**MATURITY**



**POVERTY  
TRAP**

**RIGIDITY  
TRAP**

**ASCENDANCE**

**CREATIVE  
DESTRUCTION**

**RENEWAL**

**GREAT FOR EMERGENCIES!**

Adapted from Gunderson and Holling, 2003

Keith McCandless, Henri Lipmanowicz & Fisher Qua, Liberating Structures



GoToMeeting



In the  
power of **GOTOMEETING**



"I believe GoToMeeting makes  
rapid development possible."

ANDREW'S LIST CTO



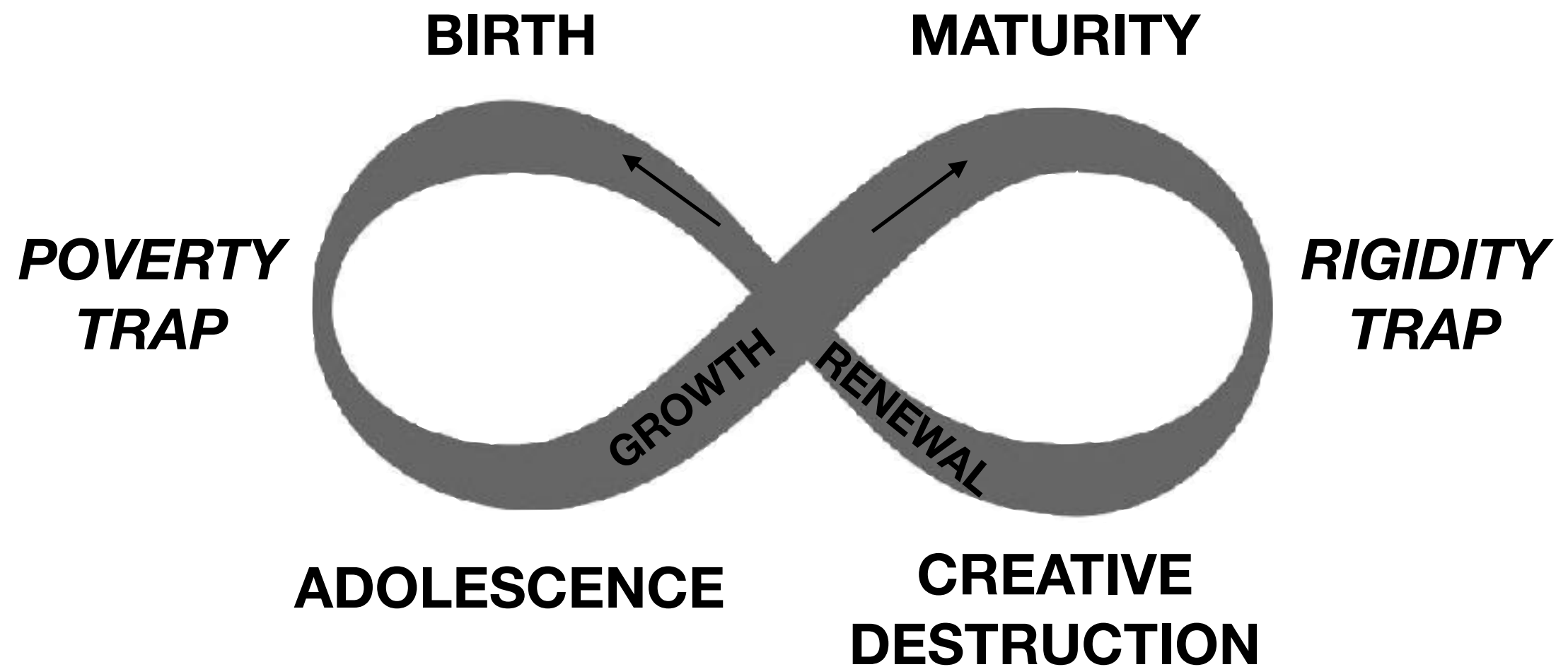




**2017**



# ***WHERE'S YOUR COMPANY?***





# CASE STUDY 2 - AppFolio



**“We are building  
another large  
company in  
Santa Barbara.”**

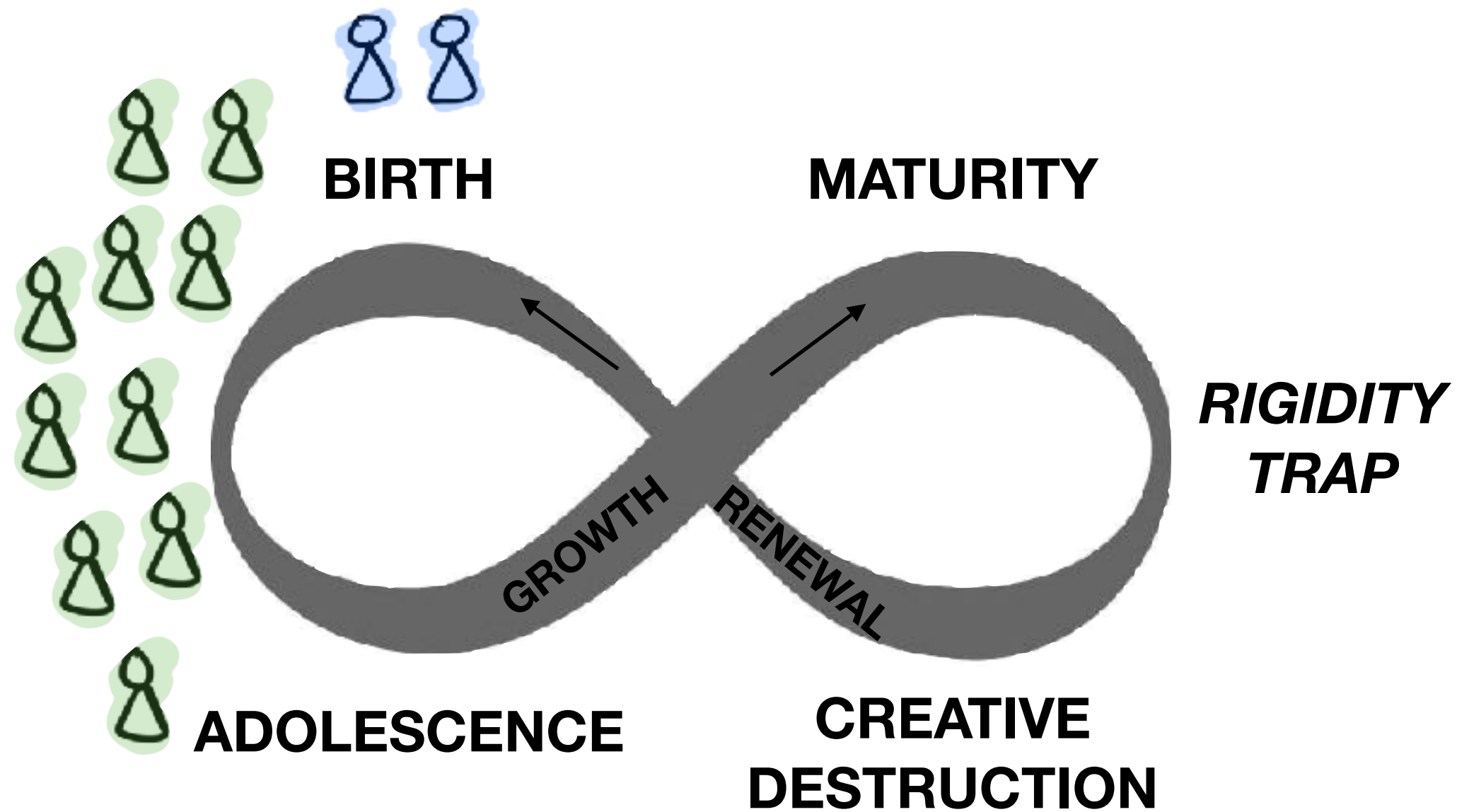








# One By One Reteaming Pattern





# FROM 10 TO 600





# MENTORS - "THE FIRST PAIR"





# I loved this company





# We grew up together





**We worked really hard**





# Others invested in us





# We invested in our people



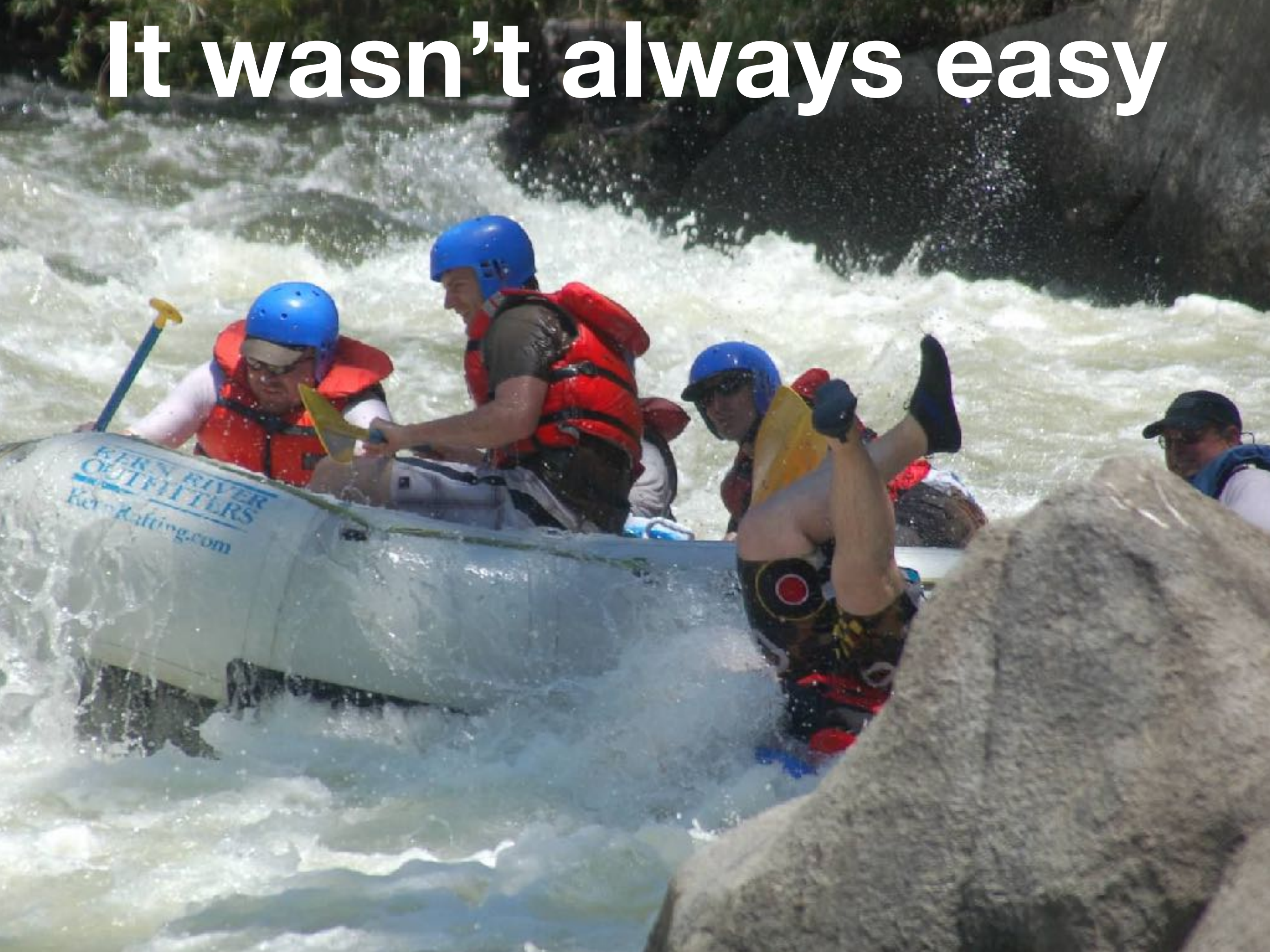


# We were aligned





**It wasn't always easy**





# We'd help each other





# We took risks





# Customers started coming





# We Grew



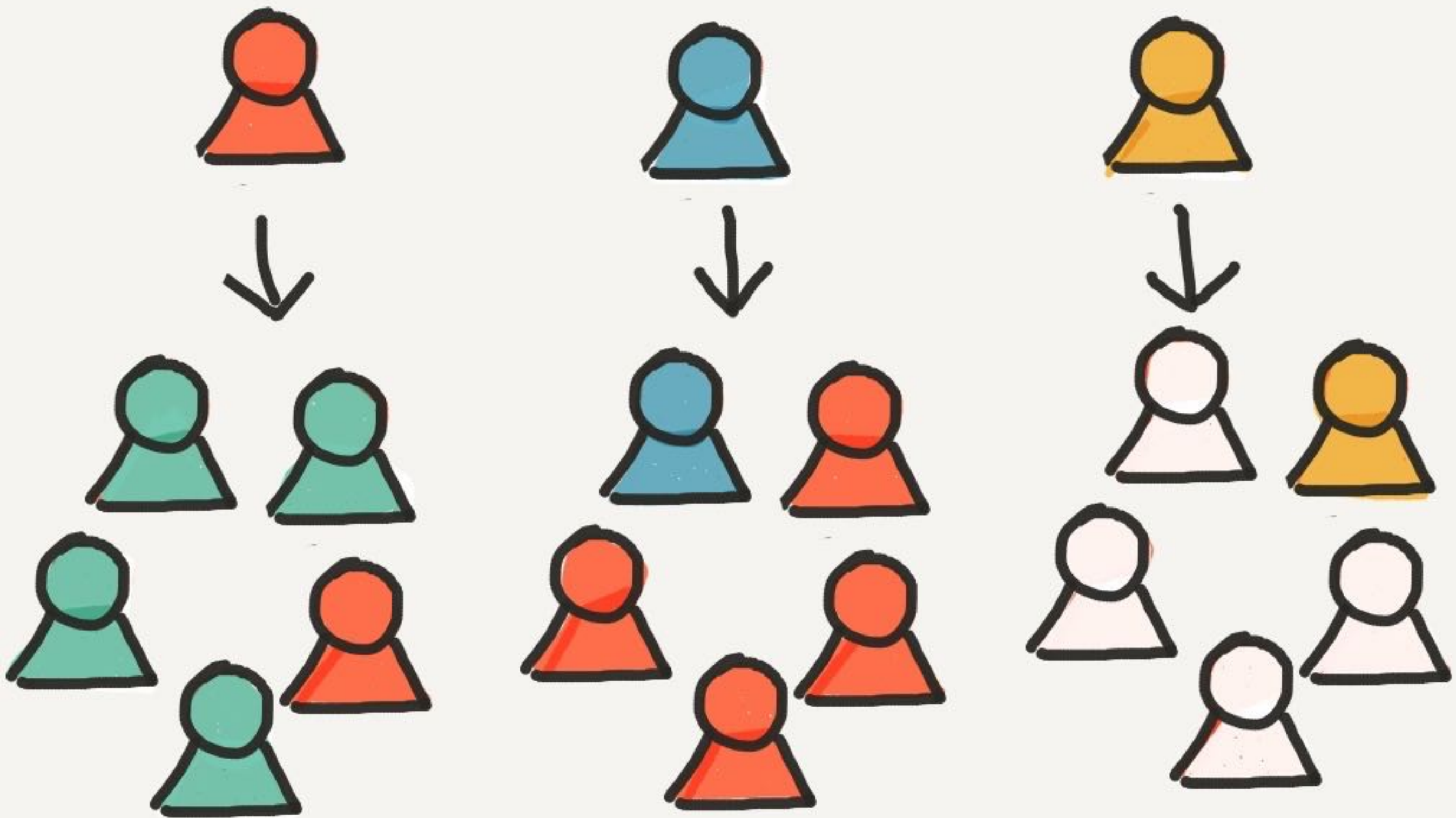


# MULTIPLES ARRIVED



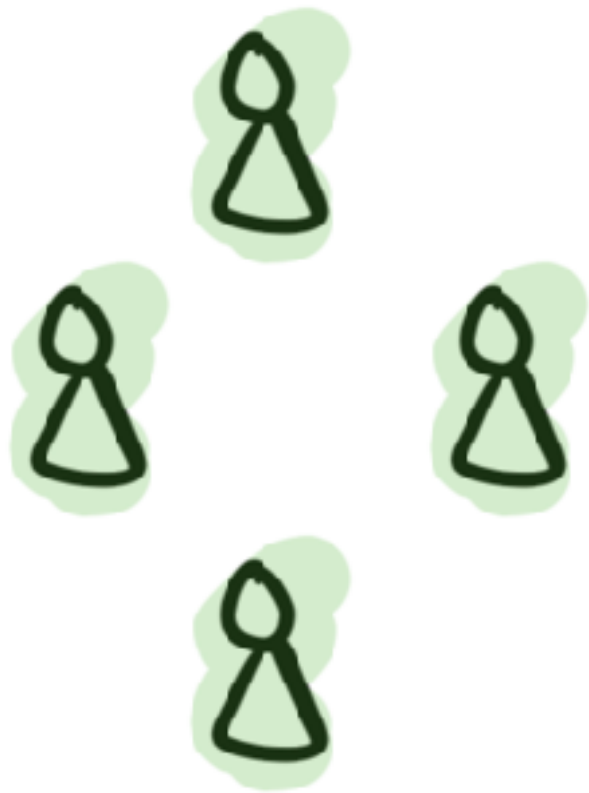


# SPREAD OUT NEW HIRES



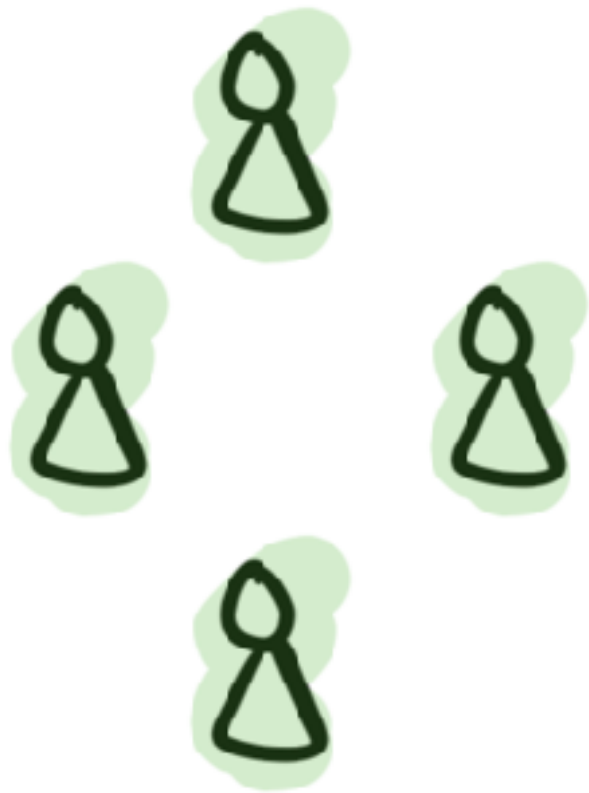


# FORM NETWORK



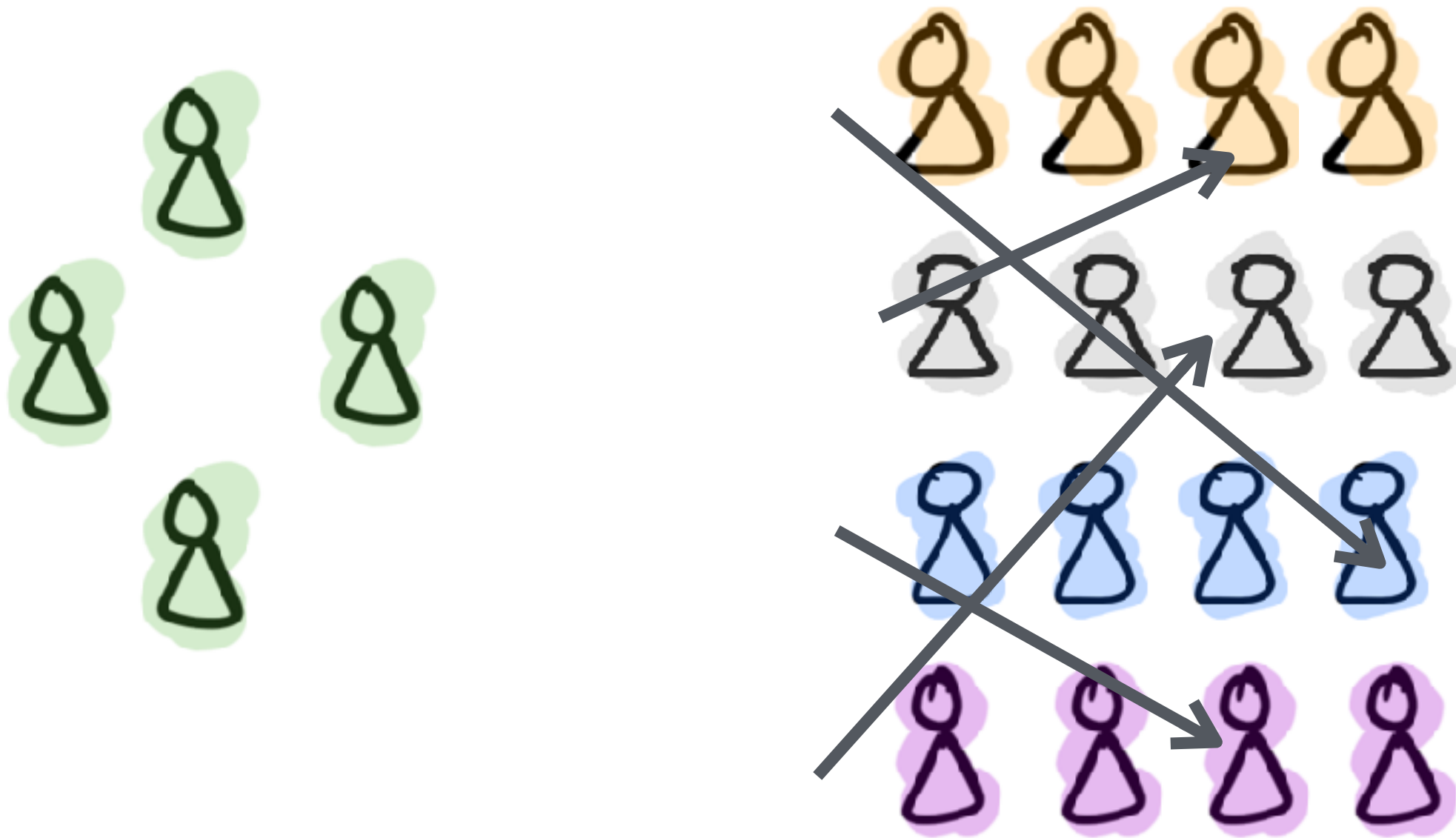


# FORM NETWORK





# DISTRIBUTE ACROSS TEAMS





# We Grew More





# And More





# We celebrated milestones



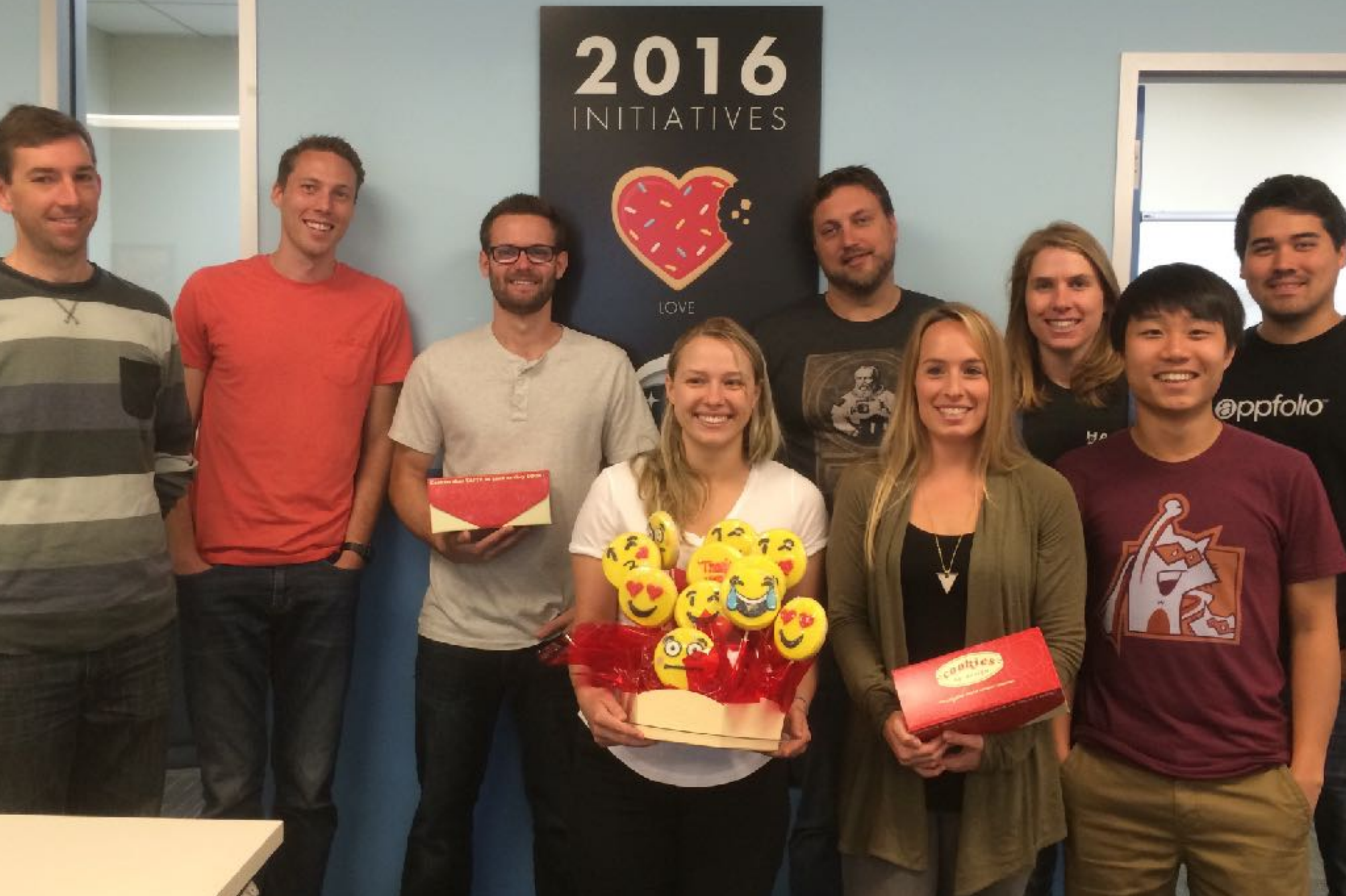


# Success was commonplace





# Customers celebrated us





## DeSimone Real Estate Services, Ocala, Florida

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





# Inspire more Scarf Knitting





# We spawned another company



## Innovation by Isolation Pattern

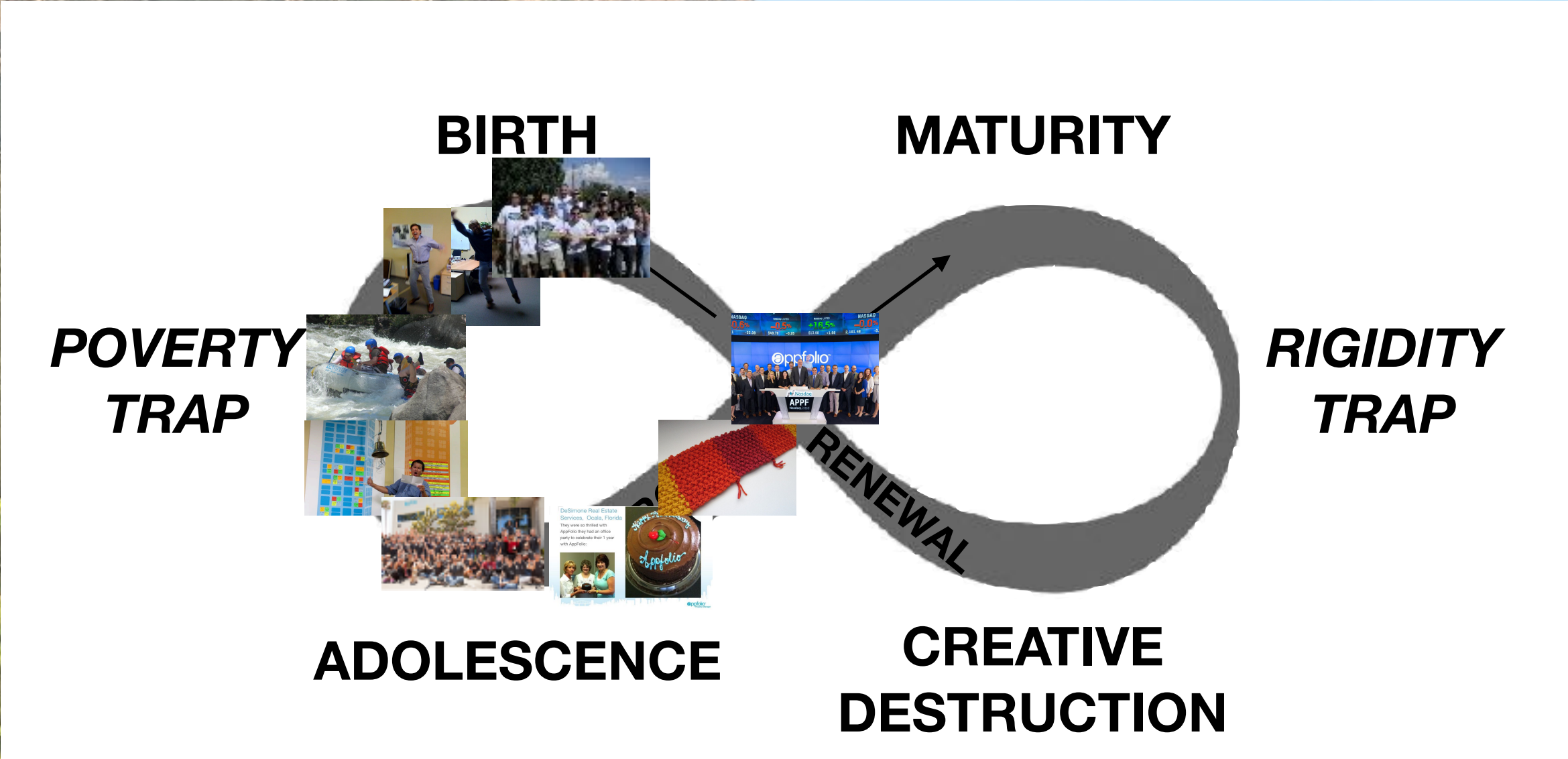


6% -33.08  
-0.5% \$49.70 -0.26  
+16.5% \$13.98 +1.98  
-0.0 2,101.48

@ppfolio™



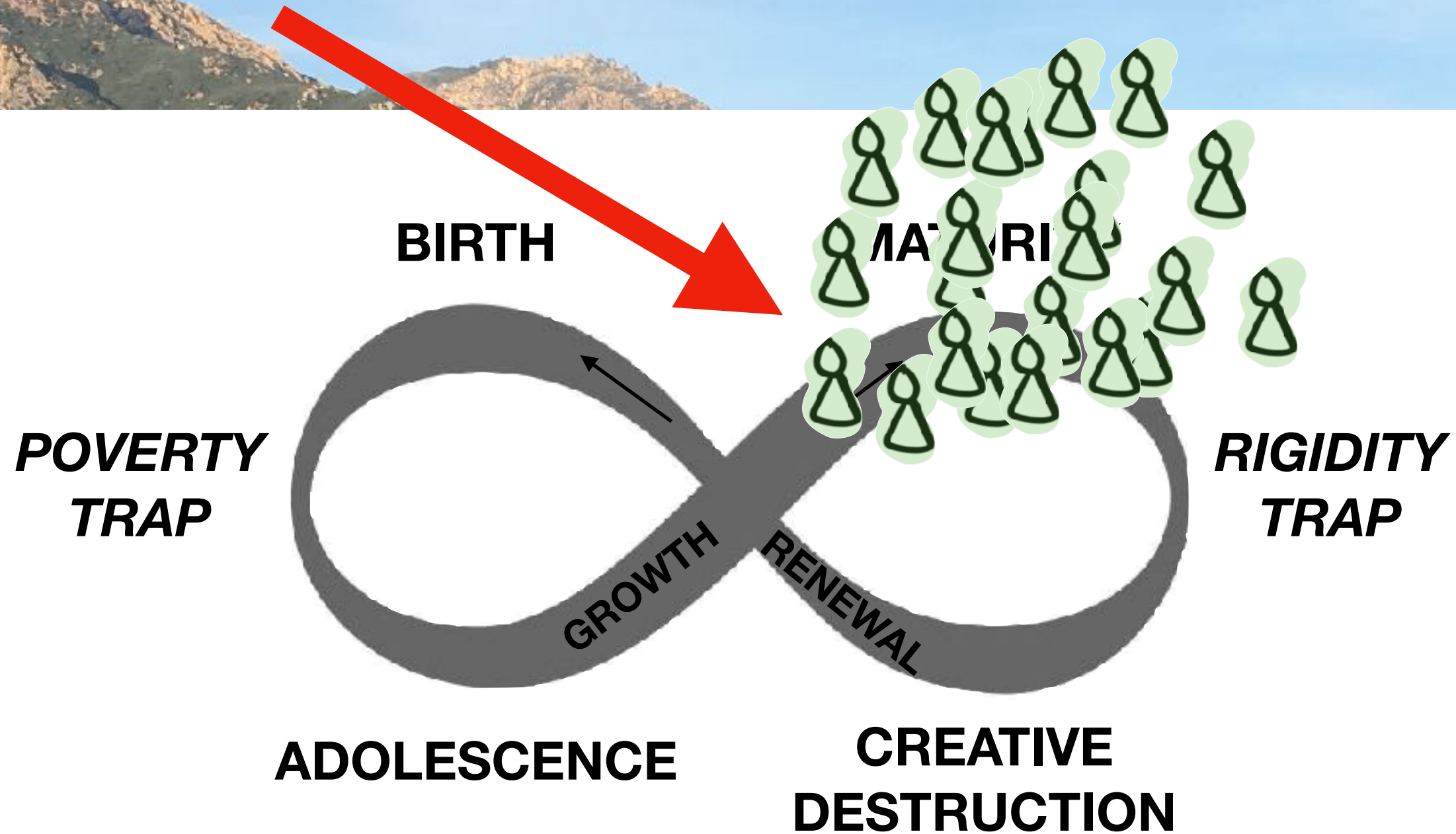




Adapted from Gunderson and Holling, 2003  
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# TEAM LEVEL



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**WHEN THE TEAM FEELS "TOO BIG"**





**DO YOU SPLIT IT?**





# TEAM IDENTITY



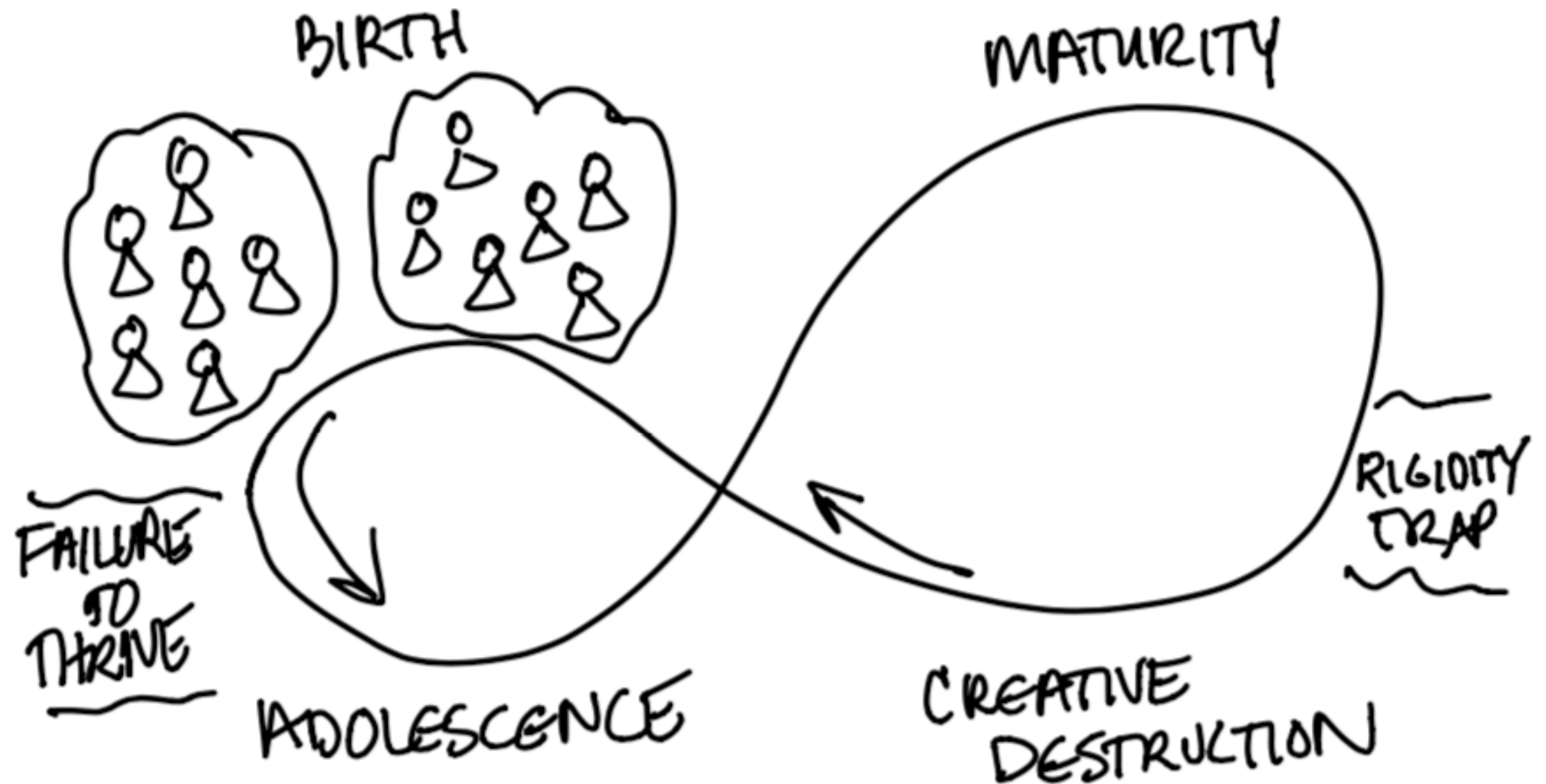




**UNRULY**



# GROW & SPLIT

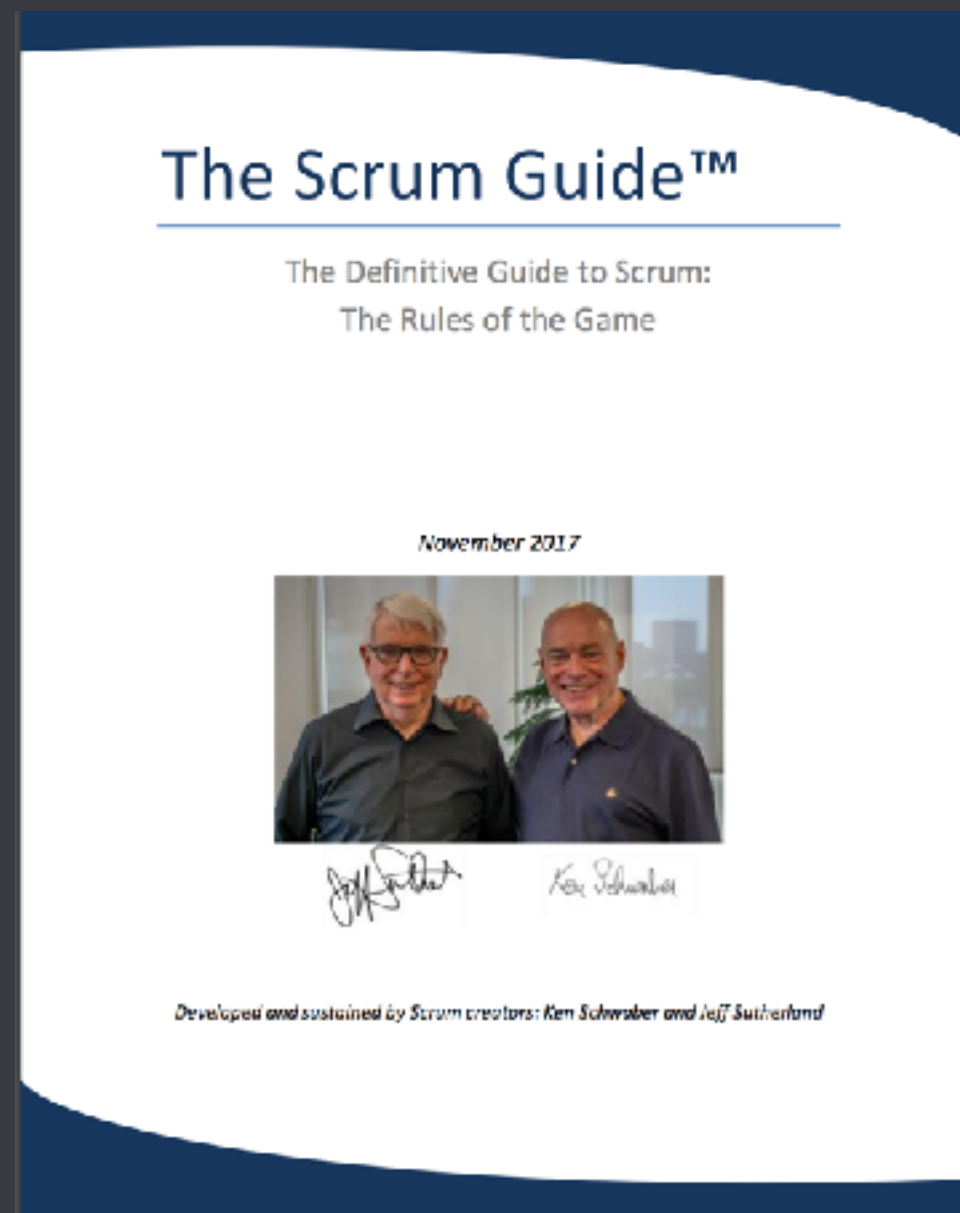




**why does this happen?**



# Because of this?





# Pain of Large Meetings?





# WAIT..Large Teams Work Too





# Shared Purpose?





# Collaboration?



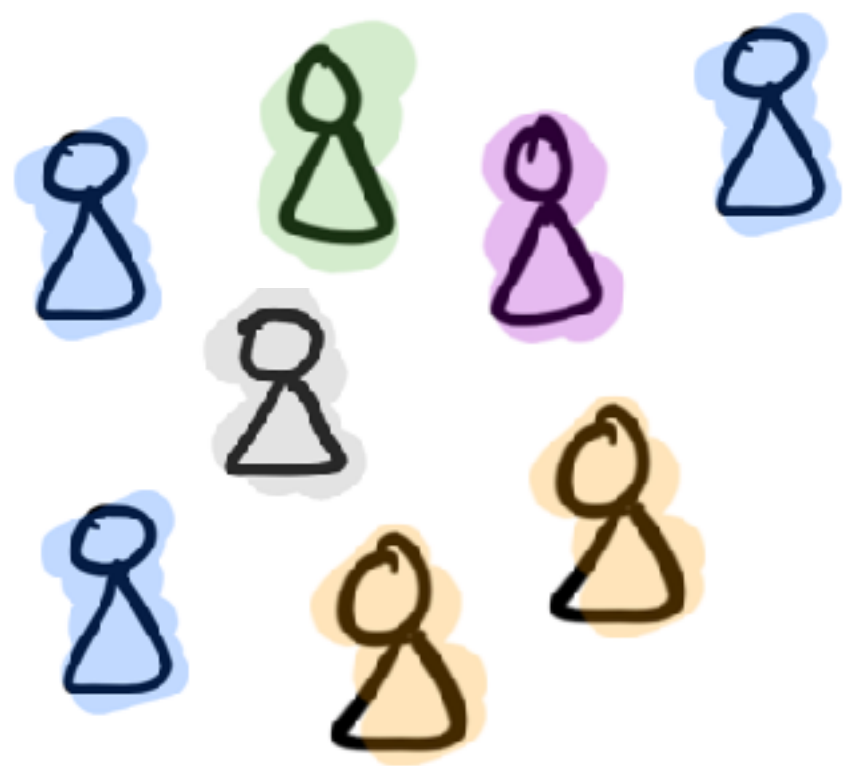
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# Who gets to decide?









# What if the people decide?





# WHEN TEAMS SPLIT

- DON'T SHARE TEAM MEMBERS
- AVOID CREATING DEPENDENCIES
- DON'T DRAG OUT THE SPLIT
- CHANGE DESKS, RESET TOOLING
- CELEBRATE THE SPLIT



# HOW DO TEAM SPLITS HAPPEN?

**LESS FREEDOM**



Forced splits

“Best practices”

Managers bring up the idea

Teams can't fathom being “allowed” to split

Team members decide to split

Teams dream up liberating structures

**MORE FREEDOM**



# CREATING INTELLIGENT TEAMS

Leading with Relationship Systems Intelligence

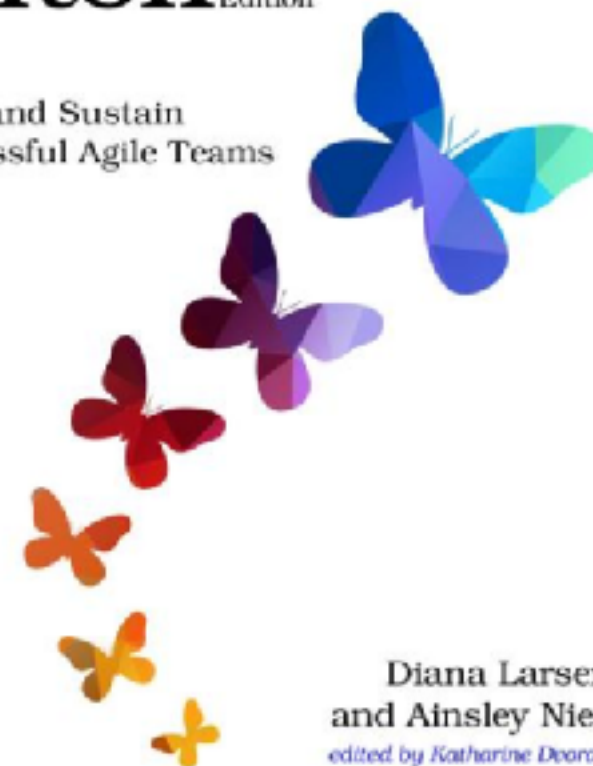
Anne Rød  
Marita Fridjhon

The  
Pragmatic  
Programmers

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

Start and Sustain  
Successful Agile Teams

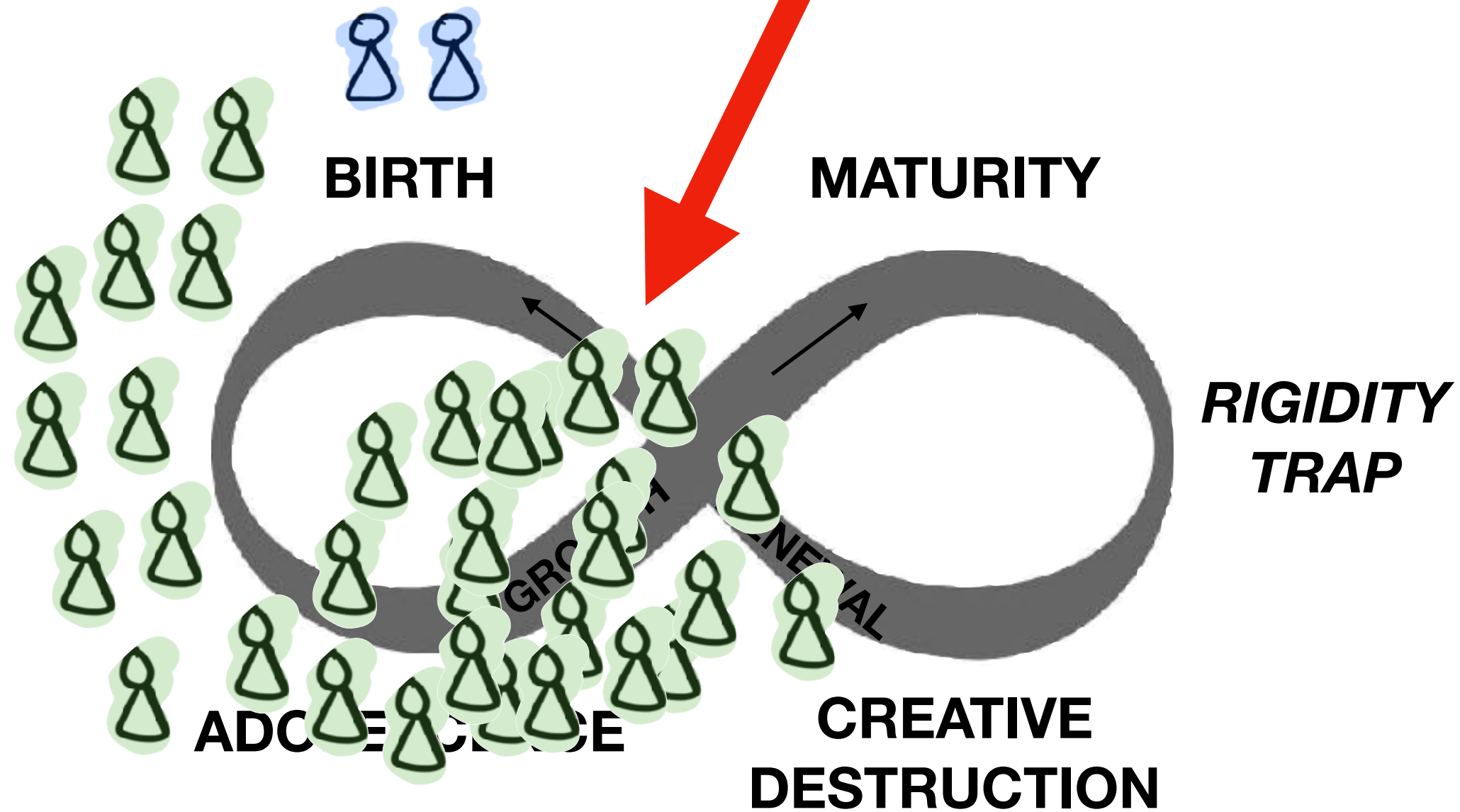


Diana Larsen  
and Ainsley Nies  
*edited by Katharine Deorak*

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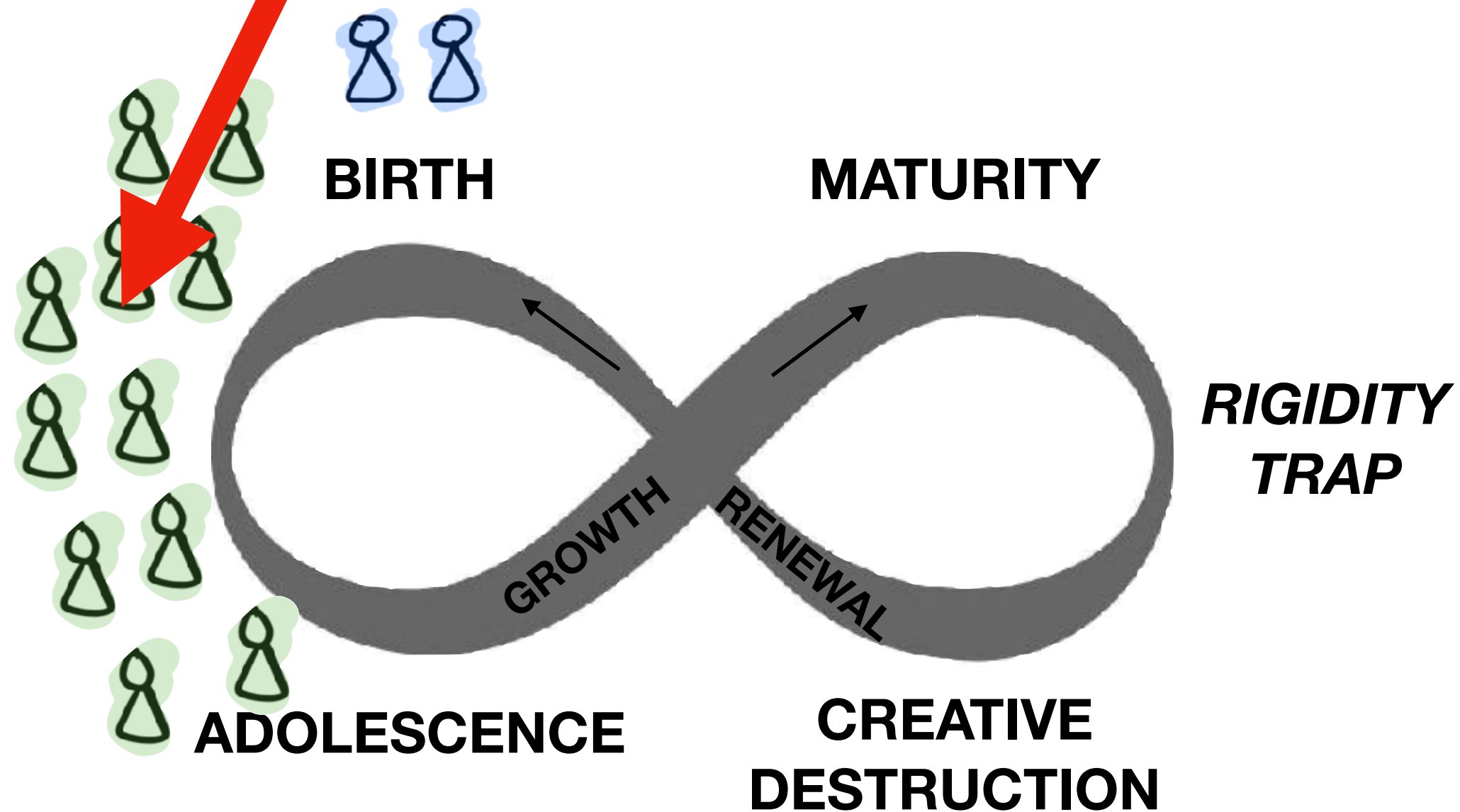


# AFTER A WHILE WE GET HERE





# IT FEELS DIFFERENT FOR THE “FIRST TEAM”





# WHO ARE ALL THESE PEOPLE?





# HOW DO WE MAINTAIN OUR CULTURE?





1, 2, 4, All

How do you approach the  
topic, "how do we  
maintain our culture"?



# "THE FIRST TEAM" ACTIVITY

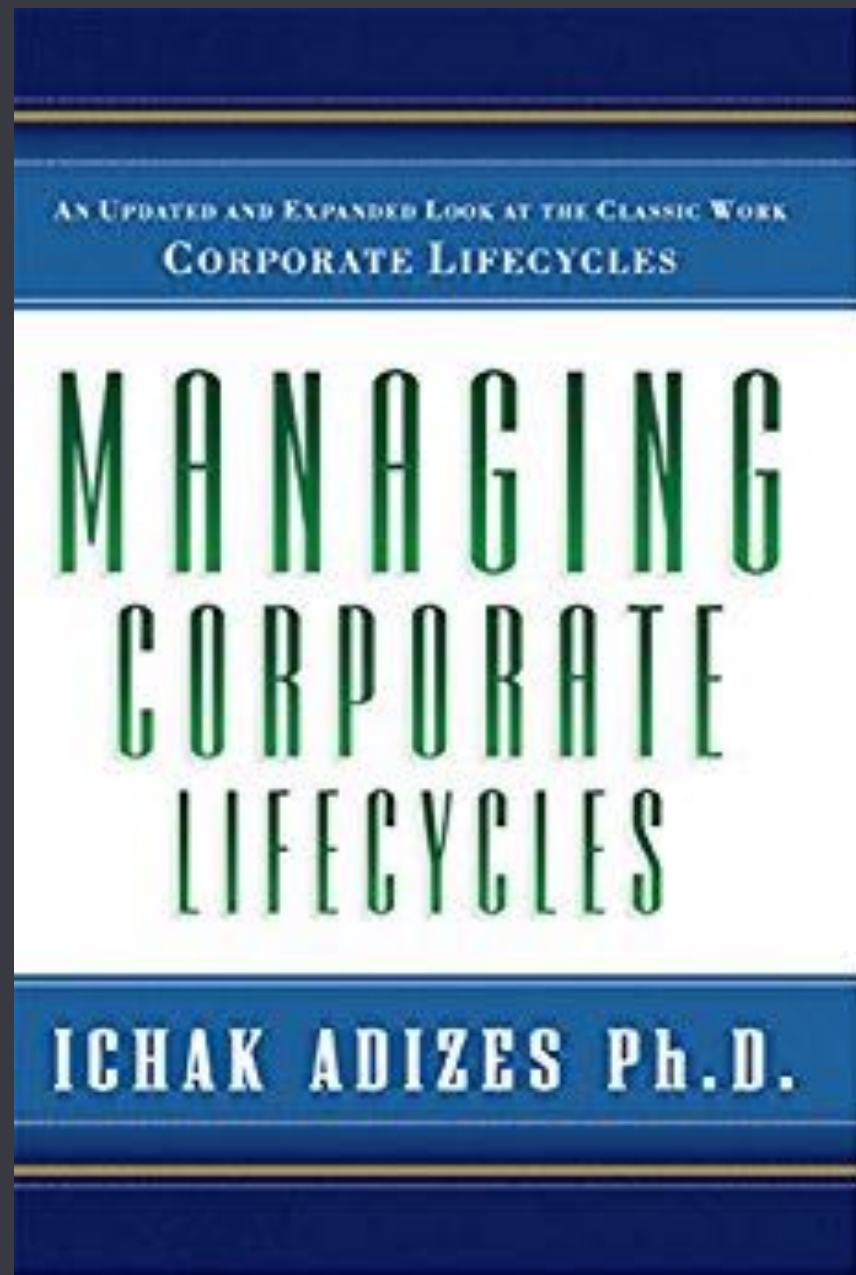




**Are there different “people” for  
different company stages?**



# Which role do you relate to most?



**P** - Producers of results

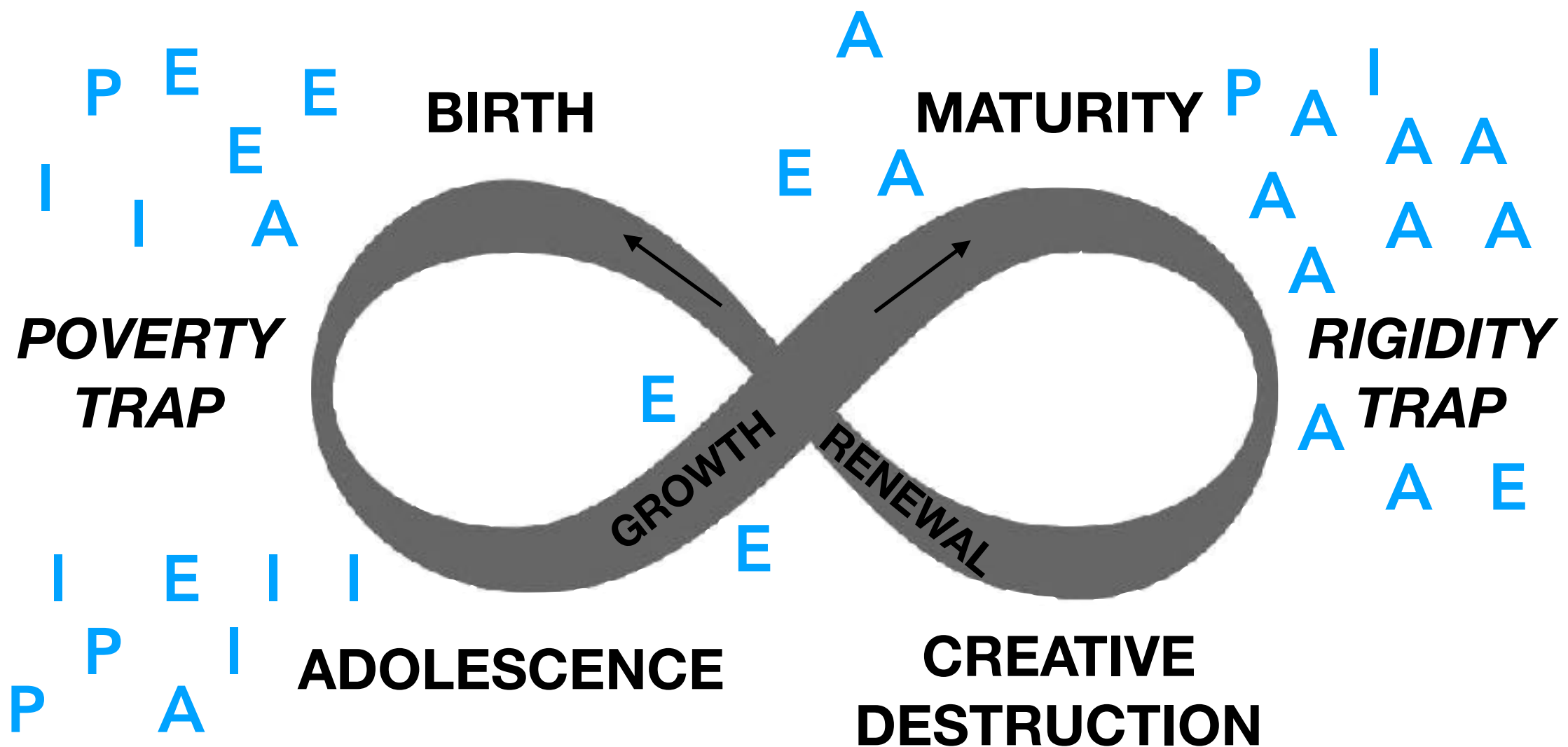
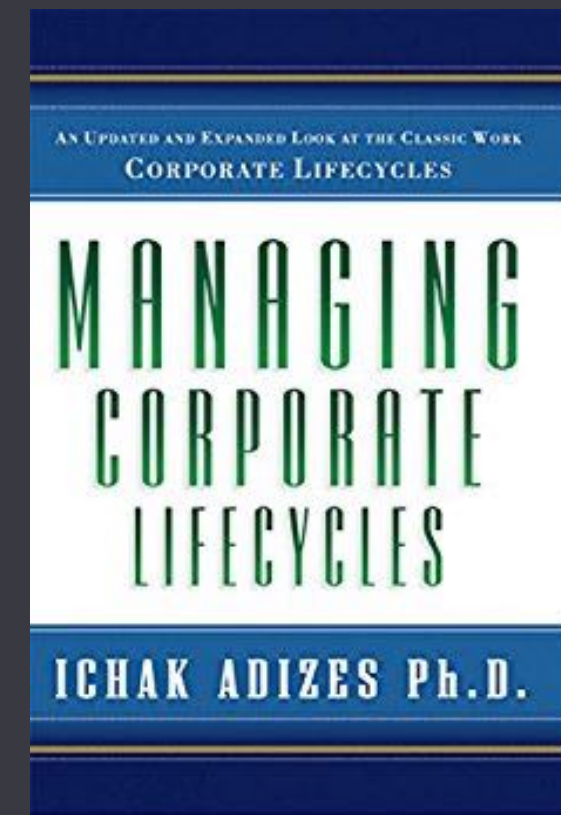
**A** - Administratives

**E** - Entrepreneurs

**I** - Integrators of people,  
culture



**P** - producing results  
**A** - administrative process  
**E** - entrepreneurial  
**I** - integrates people, culture





# IDENTITY SHIFT

No Job Descriptions

Job Descriptions

Generalism

Specialism

Less Hierarchy

Hierarchy has hierarchy

Individuals

Building groups

Few managers

Managers have managers

Department individualism

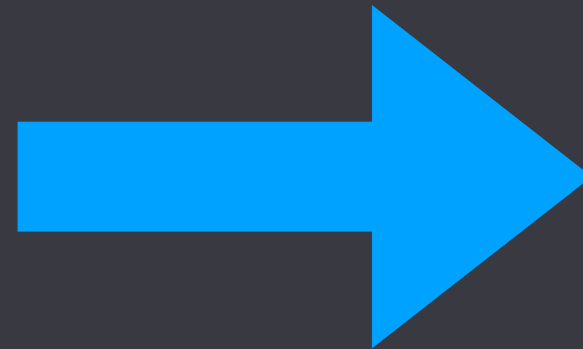
Centralized control

Focused on work

Promotions & leveling

Building to survive

IPO readiness behavior





# LISTEN FOR THE CLUES



**I'm so  
burned out**



**I'm tired**

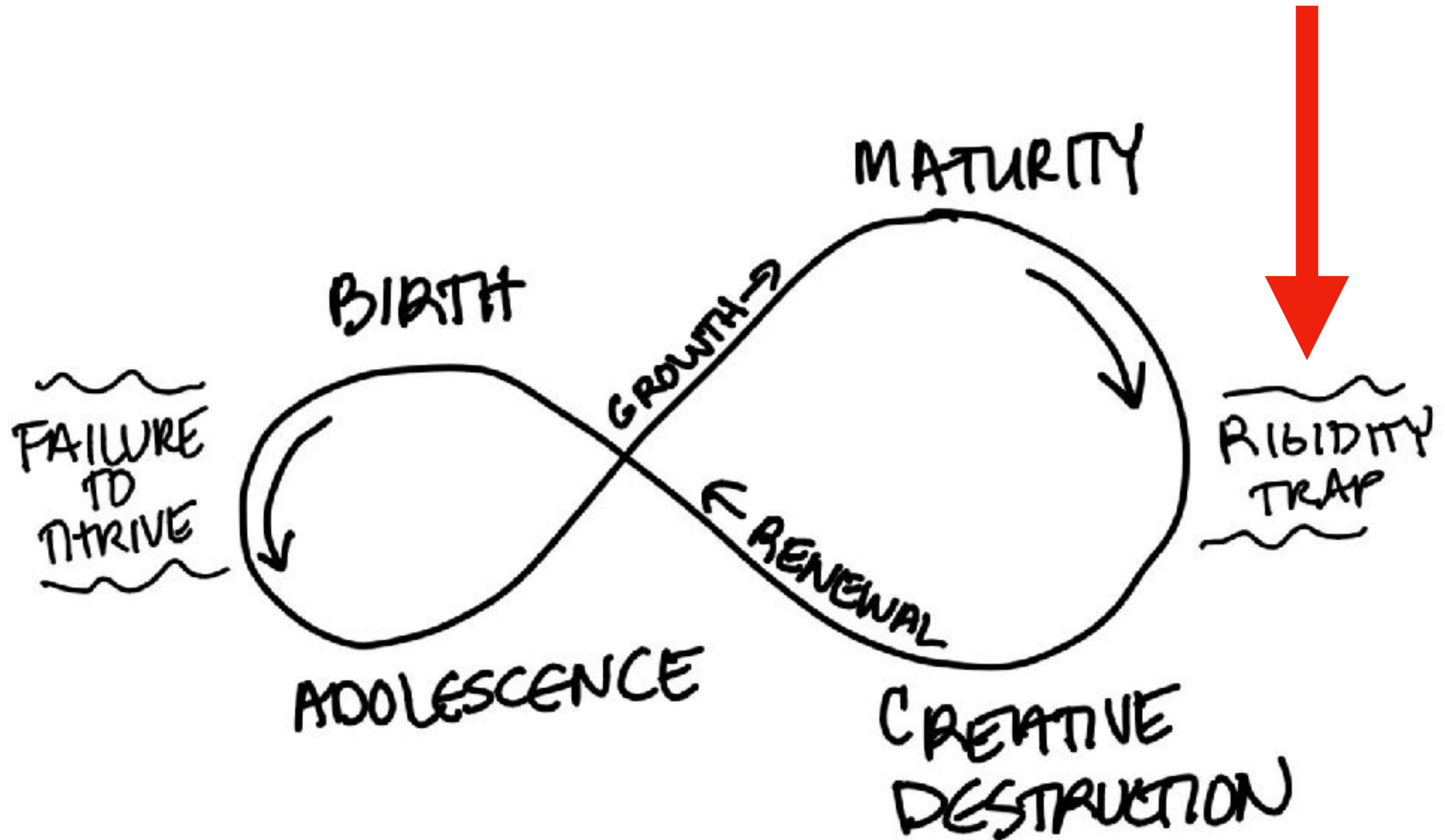


Should I stay  
or should I  
go?





# RIGIDITY & STAGNATION





**STAGNATION IS REAL**















I'm so sick of  
this guy

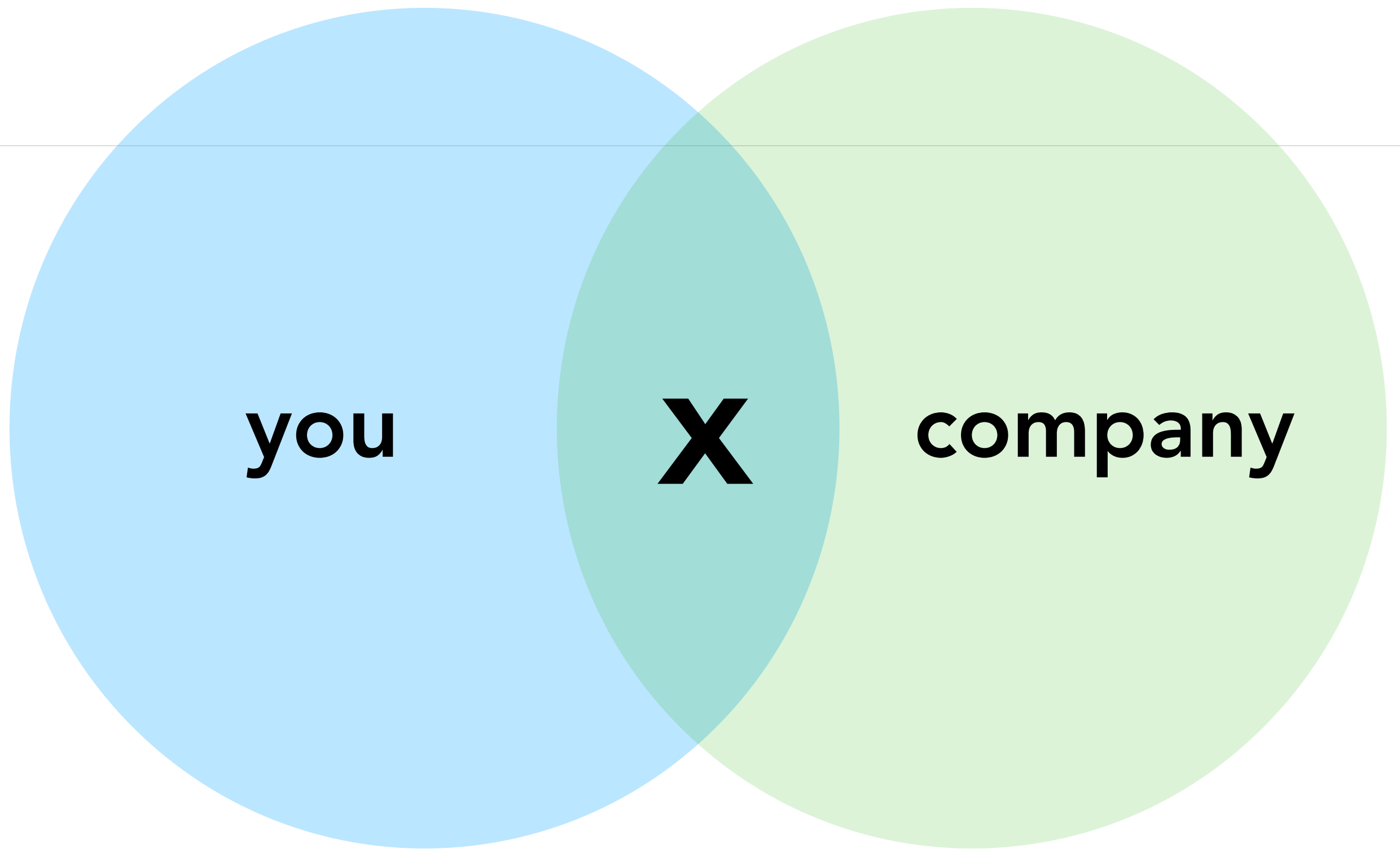






**THIS IS  
YOUR LIFE**







**Your company is stickier if you let people reteam.**





**RETEAM TO SHARE EXPERTISE**





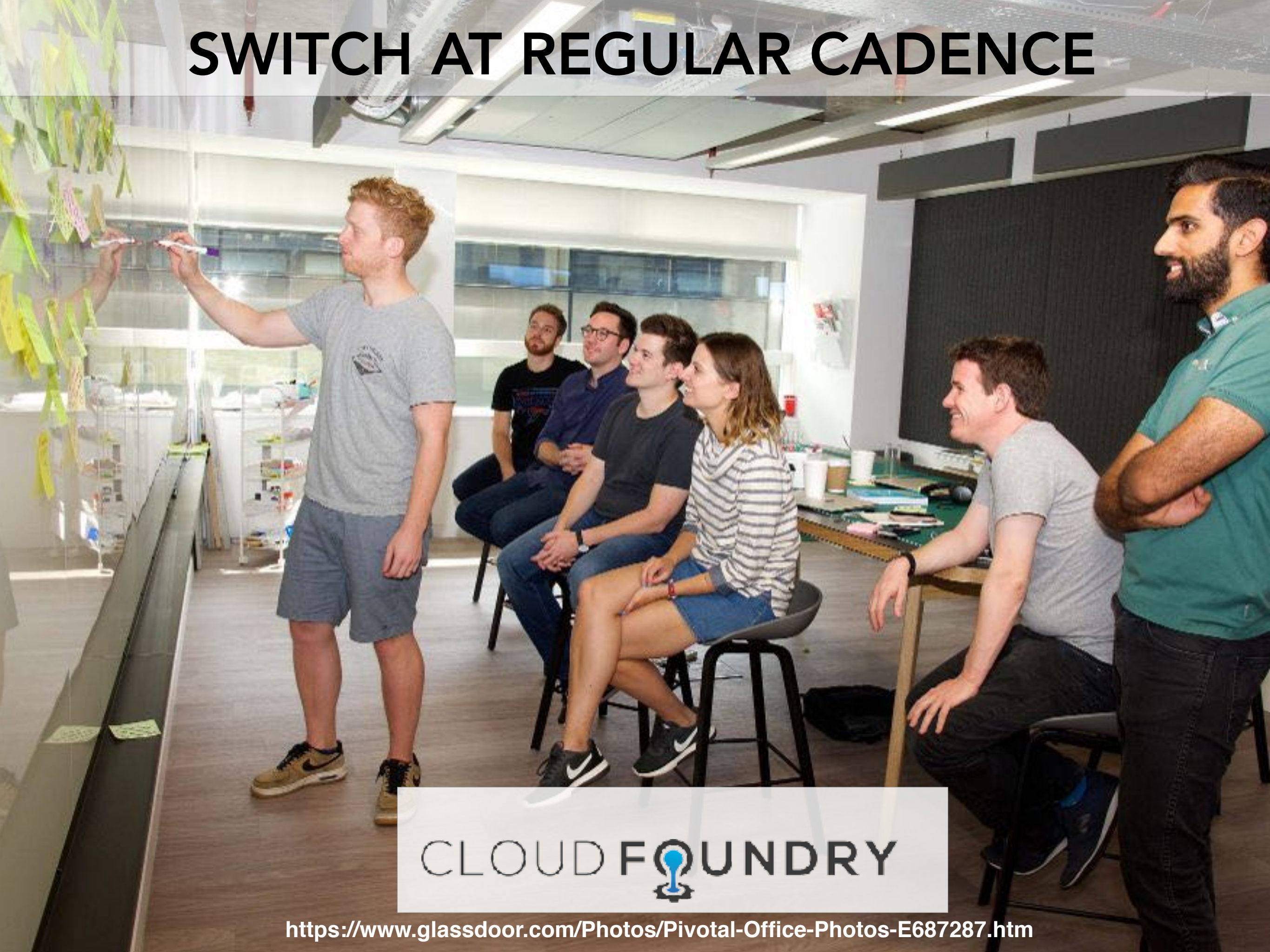
# RETEAM TO AVOID TOWERS OF KNOWLEDGE



***-Richard Sheridan***



# SWITCH AT REGULAR CADENCE



CLOUD  FOUNDRY

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



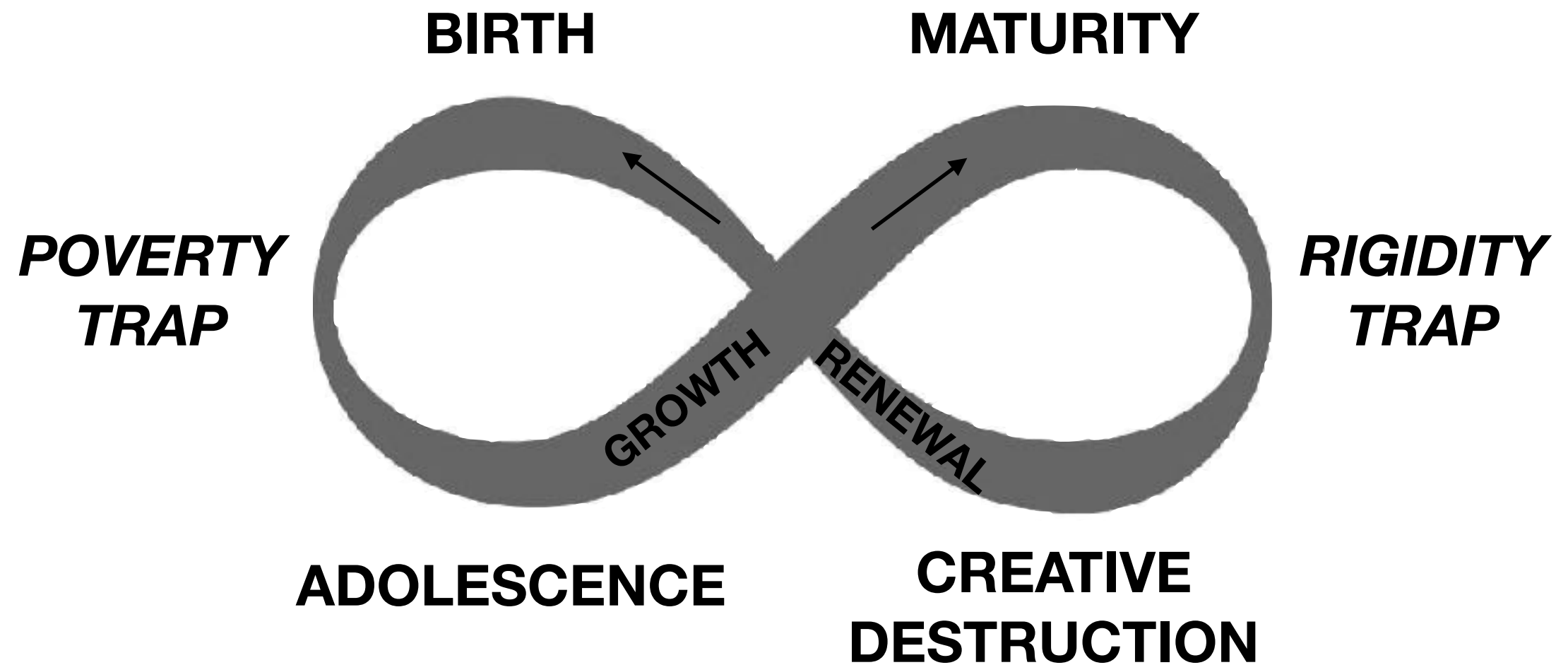
# Visualize opportunities



#openness



# Where are YOU?



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



# WHAT STORY WILL YOU WRITE?





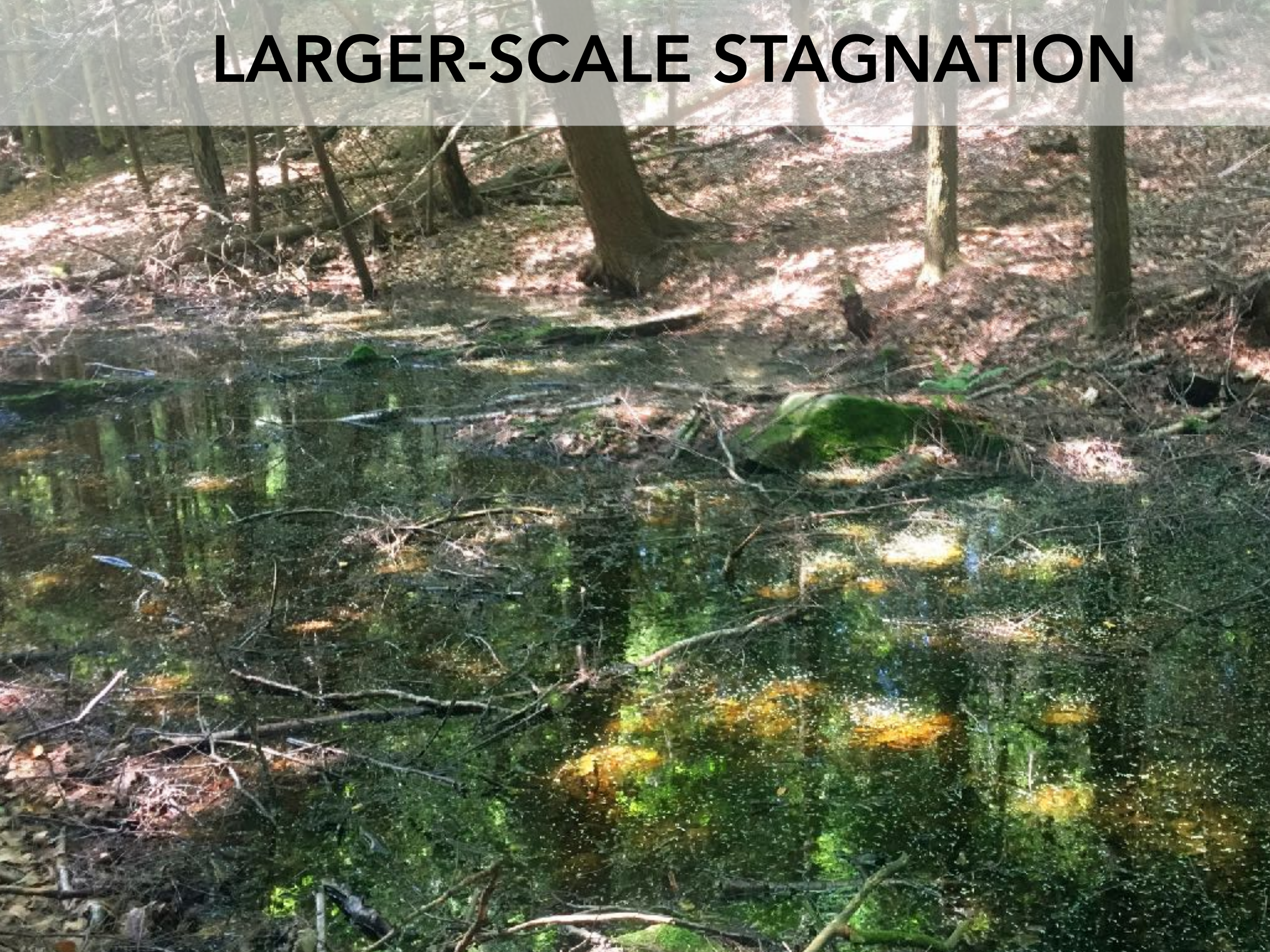
**It's all  
made up.**



**-Rick Tamlyn**



# LARGER-SCALE STAGNATION





**THIS IS  
YOUR**

**COMPANY**



SOMETIMES YOU  
NEED TO **DISRUPT**  
YOUR TEAMS,  
PEOPLE, ORG

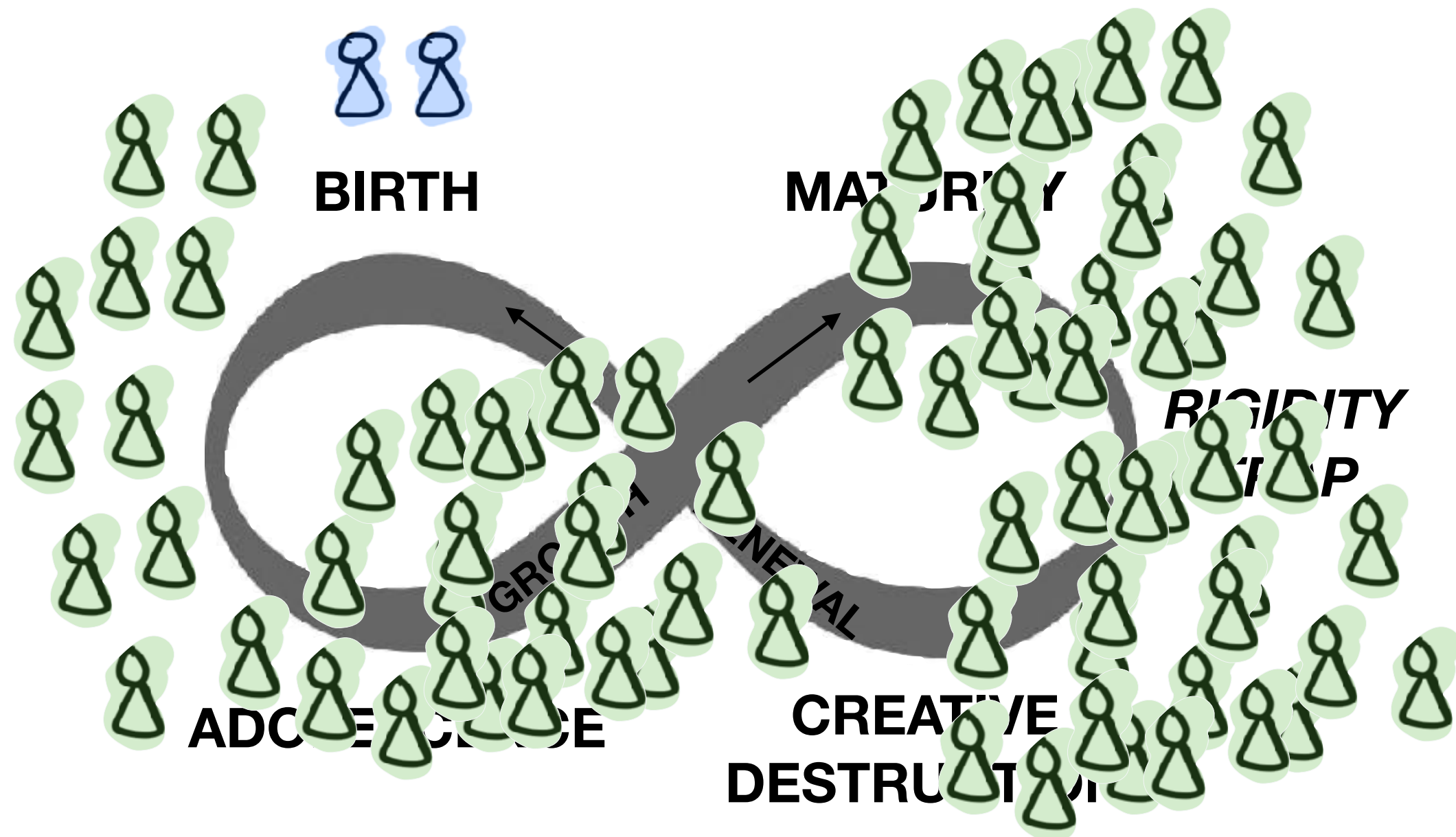


# LIBERATE THE PRISONERS

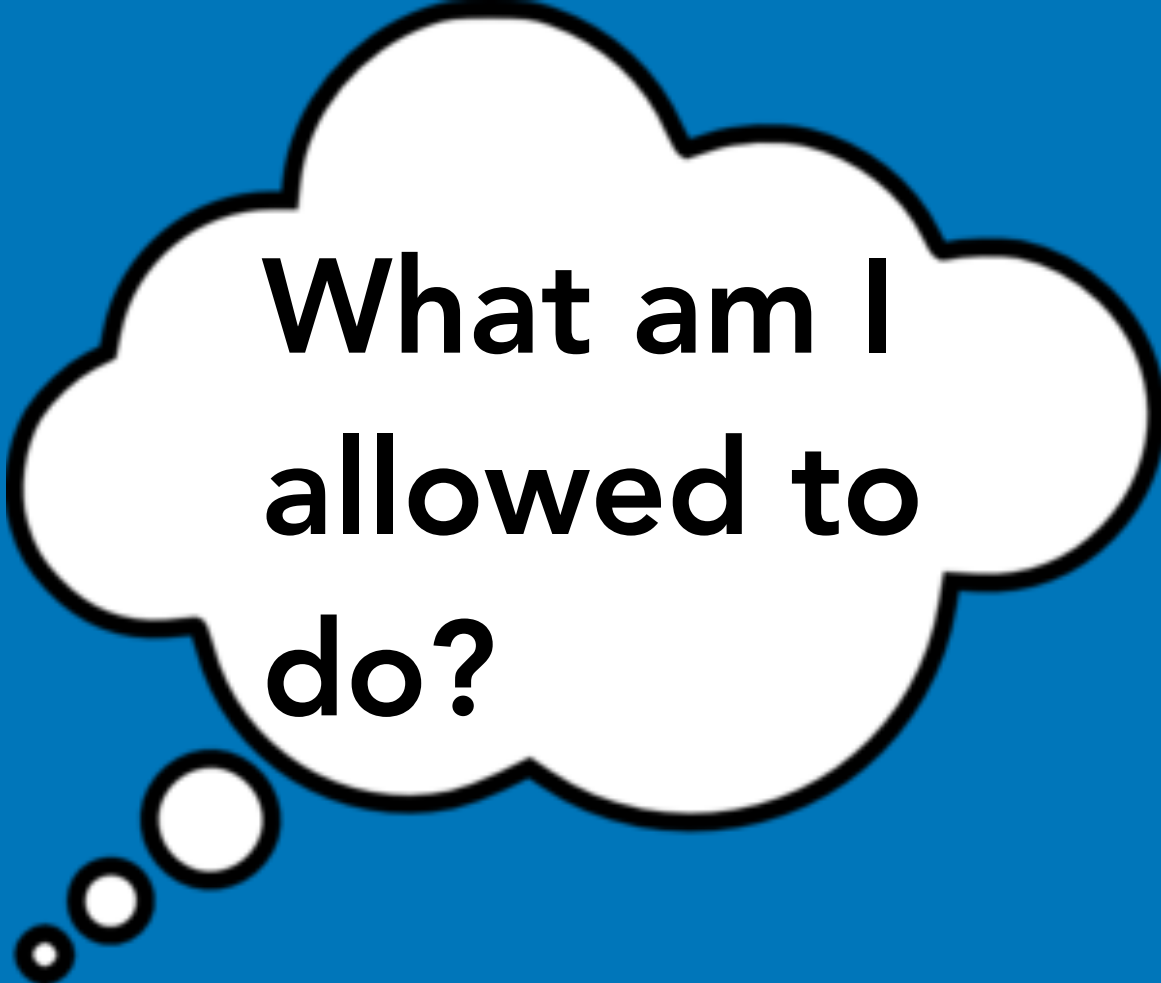




# IT COULD BE AT ANY STAGE



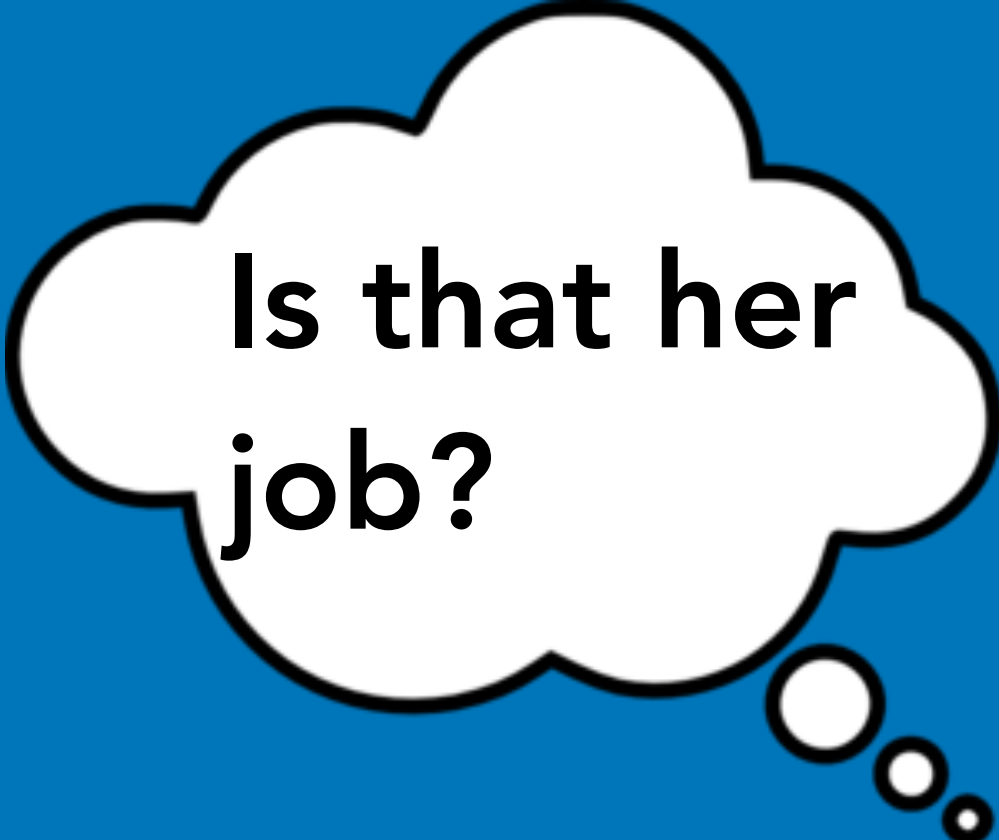




**What am I  
allowed to  
do?**



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



**Is that her  
job?**



**Who owns  
that?**



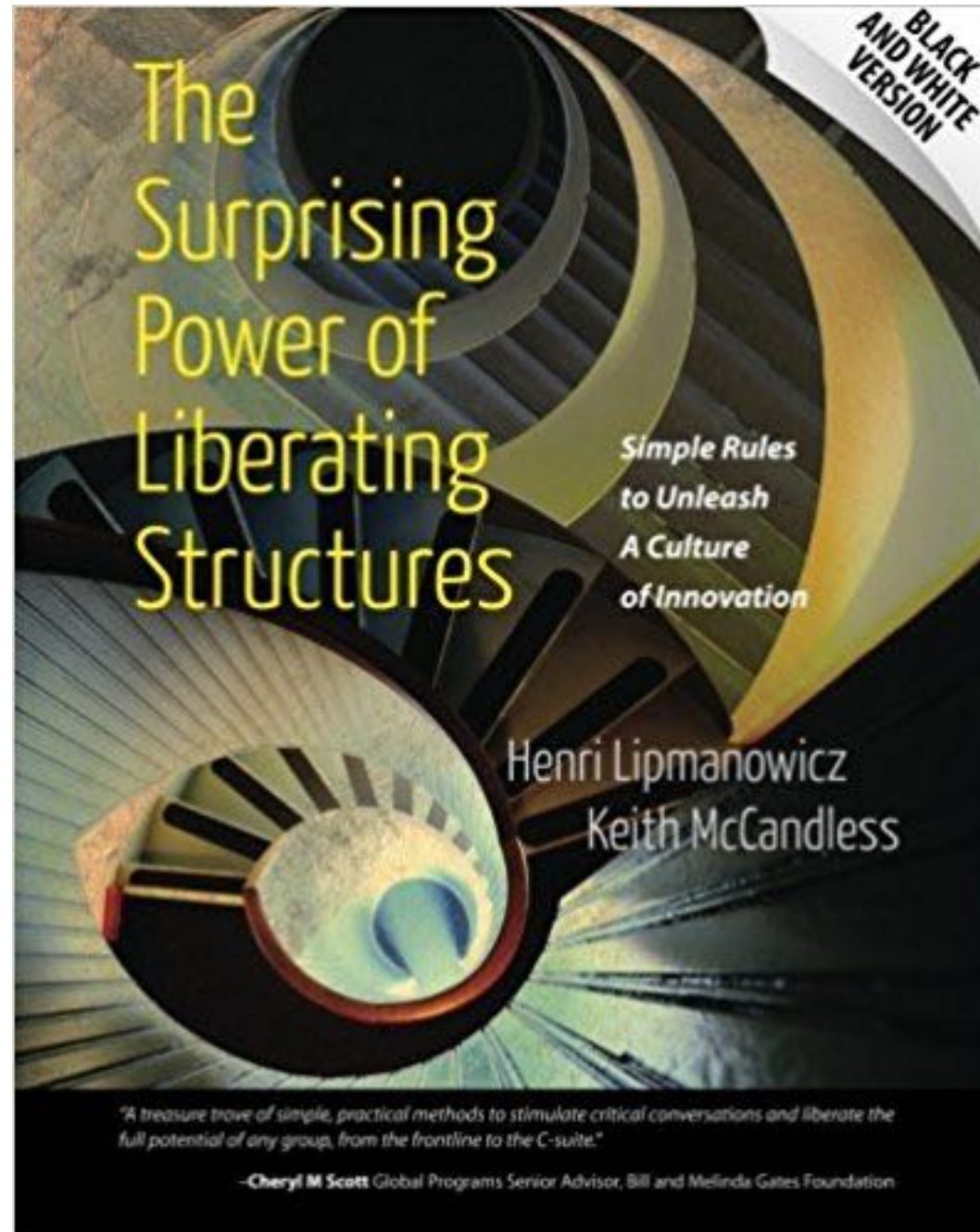
**You either catalyze the  
change**

**The change happens to you**

**You create conditions for  
change to emerge**



# Create conditions for change to emerge





















**Company-wide reteaming**  
**Growth and addition**  
**Acquire company**  
**Get acquired**  
**Attrition and layoffs**



**One by one team addition**  
**Seeding teams**  
**Grow and split tribes**  
**Innovation by isolation**



**One by one addition**  
**Grow and split**  
**Innovation by isolation**



**Change teams, roles, leave, fired**





# DYNAMIC RETEAMING

*AT FAST-GROWING COMPANIES*



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