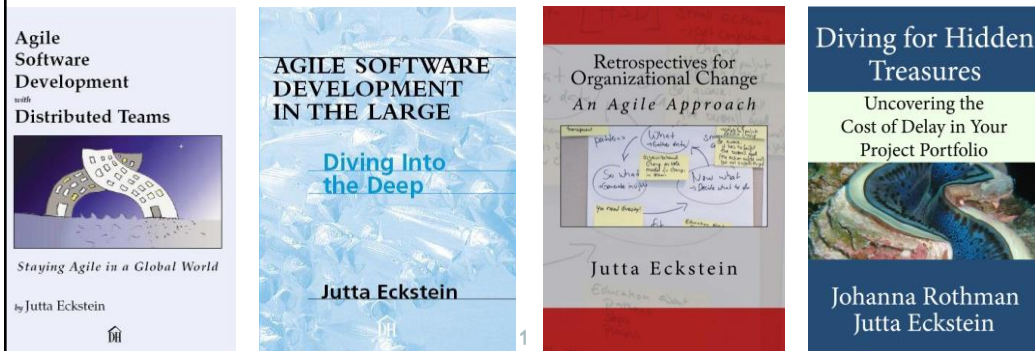


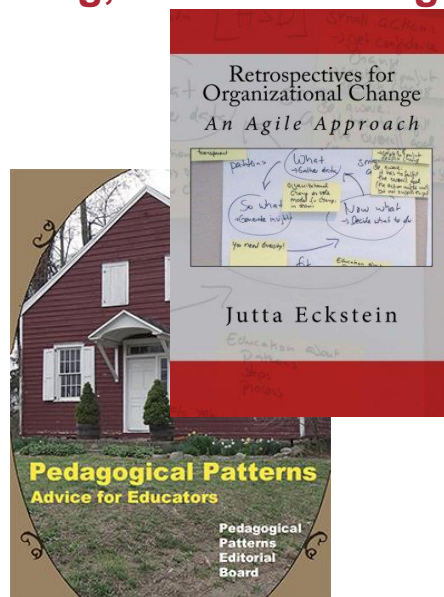
# The Secrets of Facilitating Retrospectives ...and other Meetings

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## My Interest in Learning, Teaching, and Facilitating

- BA in education and teaching
- M.Sc. as engineer
- M.A. in Business Coaching and Change Management
  - Facilitation at core
- Independent coach, trainer, and consultant
  - Main contributor to the pedagogical patterns project



## Team Events

- Retrospectives
- Planning Meeting
- Review
- Daily Stand-Up
- Workshops
- Trainings
- Generic Meetings

## Agenda

- Preparation
- Design & Construction
- Facilitator
- Specific Problems
- Summary

## Preparation

## General Preparation

- **Who will / should participate**
  - Peers, e.g. all developers
  - Cross-hierarchical, e.g. including management
  - Internal only or are e.g. clients part of the event
- **Location**
  - Onsite or offsite
  - Size of the room
- **Facilitator**
  - External or internal

## Organizational Preparation

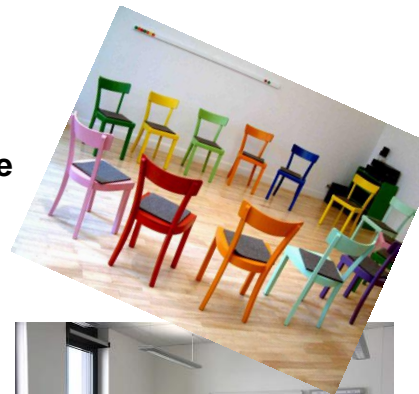
- **Work material, such as:**
  - Flipcharts: stands and paper
  - Colored cards, post its
  - Pens, markers (different colors)
  - Tape, pins
  - Awards
  - Camera
- **Usable walls**
- **Movable furniture**
- **Food and Drinks**

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## Room Preparation

- **Which layout is possible?**
- **How should people work during the event?**



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## Methodical Preparation

- Anticipate retrospective mentally
- Concrete plan including times for individual steps
- Plan B
  - Short cuts and deep dives

00:30-00:40	10	Analyzing timeline	at first individual reflection and un-facilitated exchanges. Then questions to the plenary: (1) What's attracting attention (e.g. color cluster); (2) What's surprising?; (3) What kind of patterns/themes stand out?		plena
00:40-00:45	5	Seismograph	Who wants to draw his seismograph on the current timeline? Who else?	Can also be omitted, if short on time	plena

## Personal Preparation of the Facilitator

- Know your own strengths & weaknesses
- „Resourceful“ state (physically and mentally)
- Be there in time in order to adjust

## Preparation for Participants

- **Request (beforehand or during):**

- Event data
- Effort data
- Artifacts

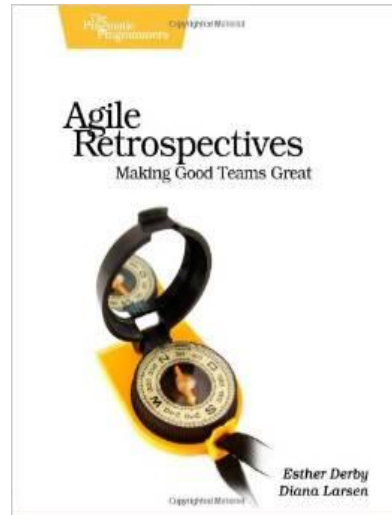
- **Ask for preparation**

- Homework

## Design & Construction

## Agenda

- **Setting the Stage**
  - **Gather data**
  - **Gain insights**
  - **Decide what to do**
  - **Closing**
- 
- **Compare to classical workshop:**
    - Intro, collect topics, select & work on topic, action planning, closing

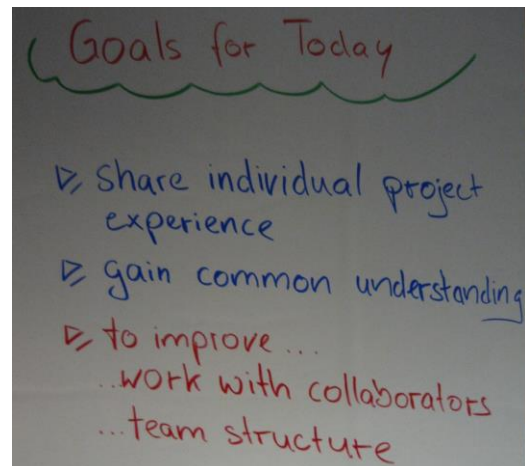


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## Setting the Stage: Purpose & Goals

- **Goal / purpose of this retrospective**
  - For management / clients
  - For participants
- **Defining an acceptance tests**
  - How could you tell if this retrospective was a success?



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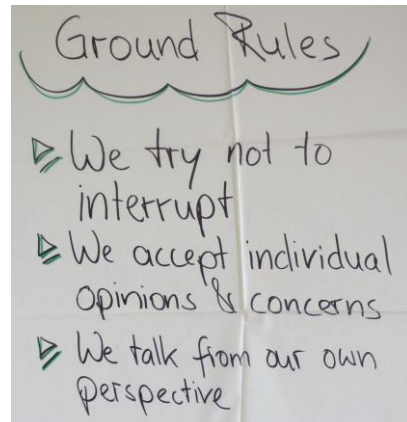
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## Prime Directive & Ground Rules

- **Regardless of what we discover, we must understand and truly believe that everyone did the best job he or she could, given**

- what was known at the time,
- his or her skills and abilities,
- the resources available,
- and the situation at hand.

(Norm Kerth)



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## Setting the Stage – What else?

- **Opening Round**
- **Administrative concerns**

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## Dealing with Time

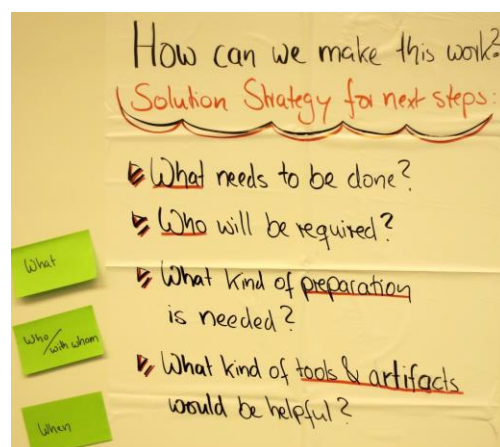
- **Ensure your methodical preparation provides leeway**
- **For specific tasks for individuals or small groups use time-boxes**
  - You can allow some extra minutes if you sense it's needed
- **For group discussions use lean coffee approach**
- **In general: Ask for feedback**
  - How much more time would you need?
  - Is it worth spending more time?
  - Who would like to spend more time?

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## Framing Activities

- **Use at least two communication channels**
  - Describe & visualize
- **Repeat and/or emphasize**
- **For different steps**
  - Give brief overview
  - Yet explain steps timely



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## Facilitator

## Definition

- **Objective supporter / servant of the group, „midwife“ for the content**
  - Enabling the group to work self-responsibly, which is to come up with their own solutions, by selecting specific methods.
- **No responsibility content-wise**

## TCI – Theme Centered Interaction



### ■ Balance between:

- The individual, the group, and the topic
- Acceptance how everything is embedded in the environment (Globe)

### ■ Three postulates

- Be your own chair person, the chair person of yourself.
- Disturbances and passionate involvements take precedence
- Be responsible for what you do and do not do - in your personal life and in society

## Role of Facilitator

### ■ Task:

- Balancing the individual, the group, and the topic
- Transparency of process & results → visualization

### ■ Responsibility:

- Ensure everyone gets heard → nothing gets lost
- Authenticity
- Sense for group processes & individual needs

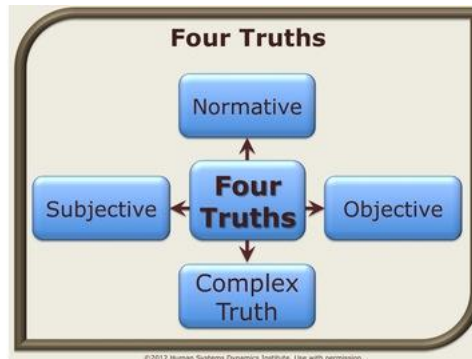
### ■ Specifics:

- Facilitator as team member
- Facilitator as manager

## Constructivistic Perspective

- **There are no objective perceptions**

- Compare to Four Truths of HSD – Human System Dynamics ([wiki.hsdinstitute.org/](http://wiki.hsdinstitute.org/))



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## Participants in the Focus

- **Change between different participation possibilities**

- Individual, in pairs
- Small groups, whole group

- **Change between participation styles:**

- Orally, written (evtl. anonymously)

- **Use round robin**

- Everyone has a voice
- One contribution / round / person

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## Facilitator under Pressure

### ■ „SOS“ (or rather DCO) -Approach

- Deep breath (**S**chnaufen)
- Change of physical perspective (**O**rtswechsel)
- Observe (**S**ehen)

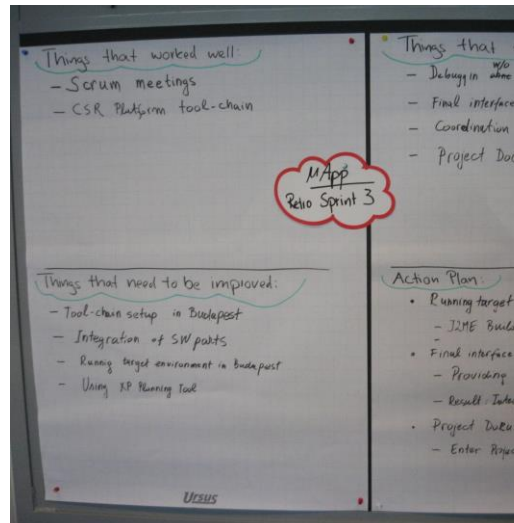
### ■ Sometimes it's recommended that everybody changes perspective

- Physical relocation
- Change of perspective regarding the issue
  - E.g. Disney-Method: creative dreamer, realistic planner, constructive critic

## Specific Problems

## Recommendations for Sprint Retrospectives

- **No short-cuts (like lists of plus/minus)**
- **Limit actions on top 3**
  - Estimation and planning of actions for next sprint
  - Tracking like any other task
- **Set the Stage for next retrospective:**
  - Verify actions

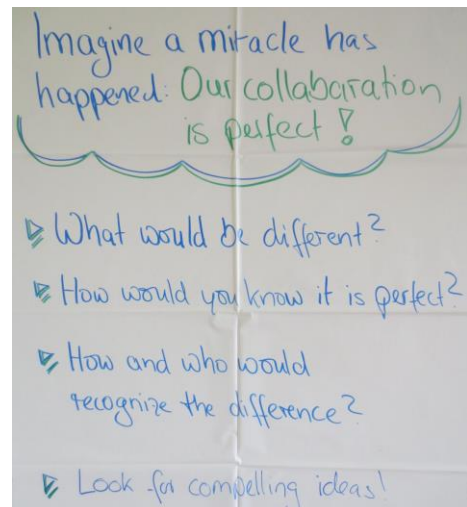
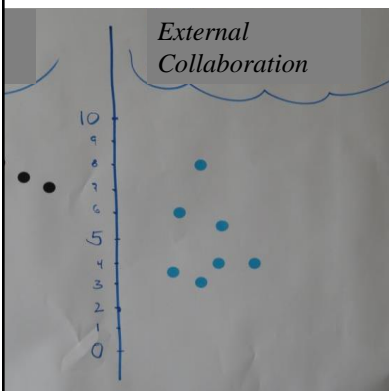


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## Problem seems unsolvable

- **Solution-focused retrospective**
  - Evtl. supported by individual evaluation of the problem



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## Problem not solvable by the Team

- **Is this based in the culture?**
- **Analysis of:**
  - „Who's in control?“
- **Paradox intervention**
- **Focus on own actions and reactions**

## Making Decisions

- **Not every topic can be decided with same approach**
- **Some things aren't ready for decisions**
- **Activities might create shared understanding**
  - Mix sub-groups and interchange people

## Making Decisions

- Autocratic
- Majority
- Consensus
- Consent

## Summary

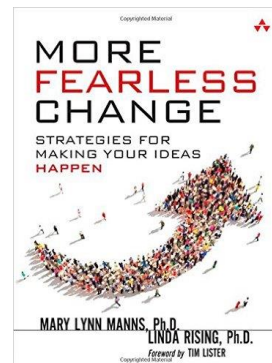


## Facilitation

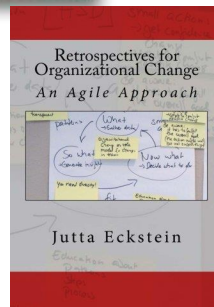
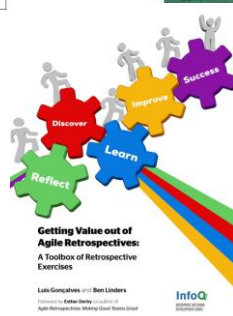
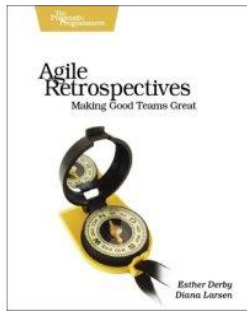
- Gives everyone a voice
- Ensures buy-in
- Creates shared understanding
- Enables different perspectives
- Supports learning

## Next Steps

- Learn more about retrospectives
- Learn more about facilitation
- Anchor the idea of retrospectives in your organization
  - Check out: More Fearless Change von Mary Lynn Manns und Linda Rising



## Literature (1)



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## Many Thanks!

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