

Creating Your **Team Room Checklist** and Lessons Learned

❑ **Identify funding source**

- An obvious first step, but there are nuances.
- FY boundaries and “color of money” issues cause enormous confusion and delay because of the inherent constraints contained within these restrictions.
 - All stakeholders need to be informed early in the process of any restrictions.

❑ **Identify available space**

- Your team room type and design will be constrained by the space you have available.
- If you have the choice of multiple spaces, consider costs associated with renovation, network and power, and how long you can occupy the space.
- Consider using a temporary space in order to get started quickly, build initial successes and gather lessons learned.

❑ **Identify members of all teams**

- Teams are: Coordination, Occupants, Facilities, Design/Architecture, Financial and Construction
- Try to fill teams as much as possible with those who understand Agile or are willing to try new things. This can especially be a challenge with Facilities.
- It is key that the Occupant Representatives on the Coordination team are able to articulate the Occupants’ needs and have availability to participate in team activities.
- The Occupants team will need spokespeople who can represent the occupant’s needs both from the developers viewpoint and the program level. Scrum Masters can do this, and the spokespeople or some subset of them are typically the Occupant Representatives on the Coordination team.

❑ **Create a high-level schedule, including Facilities’ phase gates and financial deadlines**

- In our experience, Facilities controls the schedule and often are waiting on the other teams for decisions. Amazingly, other teams are often unaware of the schedule or the status. This leads to unrealistic expectations of Facilities and introduces large delays due to information not being available to Facilities and Design/Architecture teams when needed.
- After creating the schedule, review it during every Agile review meeting and aggressively communicate the status.

❑ **Determine Agile methodology and create working agreements, backlog, etc. for the Coordination team**

- We have had good success running the Coordination team as an Agile team with a backlog consisting of Features, User Stories and Tasks; and Planning Review and Retrospective meetings. We have run the teams using Kanban, but hold the meetings on a iteration/sprint cadence of every two weeks.
- Use your high-level schedule to create a [roadmap](https://www.scaledagileframework.com/roadmap/) <https://www.scaledagileframework.com/roadmap/> which will inform your Sprint

Backlogs, letting you know which User Stories need to be [refined](#) <<https://www.scaledagileframework.com/team-backlog/>>.

- Use a ALM (Agile Lifecycle Management) tool such as Jira or Rally to manage the backlog and make it visible to all.
 - Capture these milestones in you Coordination backlog and aggressively communicate them.
 - As with any Agile team, creating a [working agreement](#) <https://tech.gsa.gov/guides/agile_team_working_agreement/> will help the team work together.
- ❑ **Create a communication plan and incorporate it into Coordination team backlog**
- Create an explicit communication plan capturing what is going to be communicated, as well as how, when and who the target audience is.
 - Example: After every Review meeting, the current schedule and status will be sent to the Occupants and Financial teams via an e-mail written by the Champion.
 - Write User Stories for these communications and place them in every Sprint Backlog to ensure they are done at the correct cadence.
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- ❑ **Create a wiki or similar location to serve as a single source and storage location of information for all teams**
- Having a known, “one stop shopping” location for all information is invaluable
 - Example information is: Schedules, requirements, meeting notes, renderings, design layouts, action items and Agile meeting artifacts.
 - Use the ALM tool to only manage Features and User Stories, all other information goes on the wiki. If you need to refer to them in the ALM tool, use hyperlinks to the wiki.
- ❑ **Establish Occupant team metrics and gather for pre and post occupancy**
- To answer the inevitable questions of how has the team room impacted your Agile team, gather metrics before and after occupation
 - Example metrics are: Velocity, time needed for a new team member to onboard and start working productively, and metrics resulting from assessments.
 - Many assessments are available [here](#) <<https://www.scaledagileframework.com/metrics/>>.
- ❑ **Hold kickoff meeting with all teams describing process, roles, responsibilities, meetings, expected attendance, agreements, etc.**
- A crucial component of success is to use a kickoff meeting to get all teams (Coordination, Occupants, Facilities, etc.) on the same page with respect to communicating and working with the Coordination team.
 - The meeting should also be used to convey the vision, schedule, financials, constraints, risks, etc.
- ❑ **Plan requirements gathering from Occupants team using surveys, brainstorming, field trips, mockups, etc.**

- The Facilities and Design/Architecture teams will immediately request design requirements and you should expect to iteratively update them throughout the design phase.
- Planning for this early eliminates the Coordination team as cause of delay for the Facilities and Design/Architecture teams.
- ❑ **Schedule and conduct design sessions between Occupants and Design/Architecture, inviting other teams as needed**
 - We have found that having the Occupants team, or at least the spokespeople, in the same room as the Design/Architecture team is by far the fastest way to move a design towards completion.
 - Plan on having a handful of these meetings during the design phase.
 - Plan on having meetings that focus on a single aspect, such as room layout, computer networking, security, audio/visual and ergonomics.
- ❑ **Negotiate construction visits**
 - Contractors will have questions and need decisions to be made during the construction phase. Facilities will have a process for this, but it will most likely be on a weekly cadence. If it is allowed, strive to visit the construction site twice a week with a subset of the Coordination team. At best, you can give guidance to the contractors immediately, at least for some items. At worst, you can have answers available at the weekly status meeting.
 - Plan ahead as this may be an unusual request that will have to be negotiated up front. In addition, constraints will be placed on the Coordination team that must be followed, such as visiting times, safety precautions (e.g. hard hats, safety glasses, appropriate foot ware, training) and restricted areas.