



Stop Spinning Your Team's Wheels: It's Time To Revisit Your Working Agreements

ALEX KANAAN

Working agreements can help align a team in terms of expectations. This is the journey of a culturally diverse and distributed team that learned to uncover hidden impediments to create a better working environment for themselves. Through self-discovery, they reached an 'Aha' moment that helped them align and collaborate, and developed working agreements that bound them together.

1. INTRODUCTION

I had never been much of a fan of working agreements. Sure, I knew what they were, I knew what they were supposed to do, I had even incorporated a version or two in some Agile classes I had taught, but I never understood how powerful the process of developing those can be!

This is the story of how I was able to help a team I was coaching improve working relations and collaborate toward delivering better outcomes. While the outcome of this journey was a set of working agreements reflecting a new way of working, the story focuses on the team's journey of self-discovery and self-improvement. Through this journey, the team achieved a better understanding and respect for each other that transcended cultural and geographical boundaries.

In sharing my story, I hope it inspires others to appreciate that the process for creating the working agreements uncovered opportunities for collaboration and alignment that helped a distributed team deliver better value. Please note while I am unable to disclose The Company name, I can only share that it is a Financial Services company located in Texas. The names of all parties have been changed to protect privacy.

2. BACKGROUND

My name is Alex and I used to be a Project Manager in a past life. I made the transition into the Agile world back in 2009 and never looked back. I appreciated how swift and adaptive working in Agile was after the complexity and sluggishness of waterfall. I also quickly discovered that as simple as Agile was, it was really about changing the mindset of people to adopt a different working lifestyle. Changing the mindset meant people needed to be 'shown the light' and that's how I ended up being an Agile Coach.

In early 2017, I was a new hire in the role of internal coach. I was asked to coach in one of the business units. This business unit had three Agile Release Trains (ARTs) and was considered the company's poster child for its Agile transformation. That was all the background I got, there was no proper introduction and I did not know anyone in that business unit.

The first person I met was the Release Train Engineer (RTE) for one of the ARTs. She was also regarded as the ultimate person-in-charge for overall delivery at the business unit. Within the first few minutes, the RTE made it clear that the ARTs were doing great and she took exception that I was being sent there without any coordination. She felt if needed, she would provide any Agile coaching herself. As I was listening to her talk, I suddenly felt a lump in my throat as her words rang in my ears. All the years of my coaching training were flashing before my eyes. Lyssa Adkins' voice echoed in my ears about the importance of explicitly getting permission for engaging with and coaching anyone. Now that I found out no one had coordinated my presence, it was not looking like I will be getting such permission. Then an opportunity materialized for me, and a light appeared at the end of the tunnel; once the RTE discovered that I was a full time employee and she would not

have to pay for coaching services, she conceded that just maybe, after all, it wouldn't hurt that I coach the ART. Still reluctant, she agreed to 'allow' me to coach a team on the premises that I understood I would be following her lead. The trouble with that team she said, was that they were consistently unable to deliver on their commitments but she had no spare time to work with them. The stage was finally set.

3. MY STORY BEGINS

3.1 Meeting the Team – Early Observations

I reached out to the Scrum Master (SM) and Product Owner (PO) for the team. I wanted to understand the team's structure and dynamics but more importantly now, I needed to request and obtain their permission to engage. My goal was to establish rapport to get them to understand that my role was to help them improve, especially after a rocky start with the RTE.

This first meeting was off to a good start. While the SM mentioned her team needed minimal guidance as they were doing well, she looked pleased to have me join the team. The PO was new both at the Company and in a PO role. While she did not have an Agile background, she was very excited to learn about being Agile and mentioned she would welcome and appreciate any coaching that would help set her up for success. We left the first meeting on a high note. My goal of getting permission to coach had been achieved.

The Agile team consisted of eleven distributed people working both locally in Texas and remotely in Mumbai, India. The local Texas team members included both the SM and PO as well as two engineers: a tech lead and a senior developer. They worked from home three days a week but would be co-located at our headquarters at least two days. The SM and PO were almost always present at the office. The India team consisted of seven engineers, one of whom was the supervisor and effectively our India team lead. The remaining India team members had various other roles developing our solution. The team was approaching the end of their current sprint and would be holding their team retrospective the very next day. Luckily, the timing worked. I was invited to join the retrospective and meet the entire team

3.2 First Retrospective - The Uh-Oh Moment

The next morning, I arrived bright and early, eager to finally meet everyone on the team. I had decided to stay in learning mode and 'seek-to-understand'. I turned down the SM's invitation to facilitate the team retrospective and proceeded with letting her continue with the retrospective the way it had always been done. At 8:00am, the SM, PO and myself gathered in an empty meeting room in our Home Office and the SM connected the Skype link starting the meeting. The two local engineers were remote and dialed-in. The India team were all co-located in a single meeting room in Mumbai together with their supervisor. Although we were screen-sharing, no one could see anyone else as no one had turned on any video cameras.

The Scrum Master started by asking everyone the traditional three questions all at once: what went well, what should we change and what new things/ideas can we start doing. After allowing everyone five minutes to come up with their answers, she asked everyone to share what they wrote. The US engineers started. Everything was great; there were no issues, nothing worth changing, and no new ideas. India went next however only the supervisor spoke and echoed the same sentiments. This team believed they had worked exceptionally hard, and they were doing really well! The retrospective had taken less than 15 minutes without anyone identifying any need for improving. There was no mention of any impediments; in fact I was sure everyone sincerely believed there were none! This was turning out to be more challenging than I expected. While the team clearly worked hard during the sprint, however, the iteration goals were not delivered. That should warrant a conversation. This team needed help to understand how to improve.

3.3 Second Iteration - Top 10 Observations - Feedback is not Always a Gift

I spent the entirety of the next sprint in 'learning mode' to understand the team dynamics and interactions. I figured by the time we got to their next retrospective, almost two weeks later, I would have a better understanding to help me start to set them up for success. I tried very hard to gain the team's trust and let them ask questions as needed. I held one-on-one's with the SM, PO, India supervisor and US development team members. Given our team's reliance on India, and the 10 hours and 30 minutes time difference, I learnt very quickly we only had a few hours of work overlap before we went our separate ways on any day. As the sprint reached its end, I compiled my top ten observations (see Table 1).

| | |
|---|--|
| Time Zone overlap: limited overlap ending around 10am CST, meant delays resolving impediments. | Cultural Barriers: Cultural and language barriers existed and contributed to misunderstandings. |
| Doing Agile: The teams needed to improve their Agile mindset. While they went through the mechanics they were not realizing the benefits because they did not understand the value of Agile. | Lack of Engagement: Not everyone was engaged and involved in conversations. A few team members dominated conversations and the India supervisor mostly spoke on behalf of his team. |
| Goal Clarity: Team did not understand iteration goals clearly, additional context on stories required once the iteration began. The time zone difference compounded the delays in getting clarity. | Loose Timeboxes: Meetings often started late and lasted well over the allocated timebox. The daily standups in particular almost always started late because of US member personal commitments. |
| Hidden Impediments: Many impediments were not surfacing or were taking too long to surface. Time was spent on every call clarifying context on stories and resolving issues. No refinement session existed for clarity and understanding on stories. | SM as an Admin: SM was mostly concerned with managing meeting logistics and updating the Agile Lifecycle Management (ALM) tool than facilitating conversations rather than helping the team improve and removing their impediments. |
| Lack of Shared Ownership: The team did not have a concept of a shared commitment, in fact the US and India members seemed to be operating independently as two separate teams. | Poor Communication Tech: Remote meetings were chaotic, dogs heard barking, children whining and other disruptions would add to the confusion and misunderstandings. |

Table 1. Top 10 Observations

While sharing my observations, I was surprised to find both the SM and the PO validated most of these observations. The SM had been embarrassed earlier to admit her team needs help because she was afraid it signified her failure, so I appreciated her honesty and assured her otherwise. I also asked both the SM and the PO's permission to share the observations with the team at the next retrospective to get feedback. That proved to be a mistake that did not go as I had hoped. There were no discussions. Only the US team members responded to the observations. The India team shut down, and may have perceived the message as failure in delivery. This was the opposite of the outcome I wanted. Rather than engaging the team, I had alienated them instead. As a coach, I had just succeeded in demoralizing my team, I felt defeated.

3.4 Third Iteration - Building Trust Across the Team - Finally, an 'Aha' Moment

Over the following iteration, I thought deep and hard about how I could have turned the tide in the previous retrospective to improve trust. I recalled Patrick Lencioni's five dysfunctions of a team and how this team exhibited almost all of the dysfunctions, from absence of trust and fear of conflict to inattention to results and lack of commitment. Lencioni says, "Trust is knowing that when a team member does push you, they're doing it because they care about the team." I needed everyone on the team to feel they can trust one another and hold each other accountable so that their contributions mattered. What I should have done was to acknowledge their hard work and create a psychologically safe environment before sharing my observations. So I thought I would try an experiment to improve safety within the team and overcome barriers. I told the team to be prepared to share something personal with the entire group in our next retrospective. Everyone would get two minutes to share stories about family, pictures, recipes, songs, basically anything as long as it was not related to work!

At the next retrospective, I decided to go first to test the waters. I talked about how I met my wife and played our wedding dance video (which turned out to be a big hit with the Indian teams). Next, the SM shared family pictures and talked about each of her children and what were their interests. The PO opened-up on her relocation from Seattle and the stress that had caused, especially with packing and moving a huge house. One by one the team opened up and as I looked around, people started to chime in and pour their hearts out. Some stories made the teams sad, some stories made the teams happy but everyone shared something near and dear to them and emotions ran high. We celebrated with a team member who was beaming with pride letting us know his daughter had been accepted into a very prestigious university. We wept with another who shared

that a parent was suffering from an illness and how difficult it had been to take care of them. The team exchanged delicious recipes and enjoyed watching family photos and hearing the stories behind them. For the first time feelings had been stirred as cultural and distance barriers were being torn down. We were all becoming part of each other's lives. We were all putting a human face on each other.

With a new feeling of camaraderie, I thought this could be the right time to revisit those observations and obtain feedback. Once again, silence befell the teams. A few minutes later the India supervisor started talking to represent his team as usual. This is when I stepped in to interject. I told everyone that in order to become better as a team, we need to hear directly from every single person. Everyone on the team made a difference and had a voice that needed to be heard. All opinions and contribution were highly valued whether or not we agreed. We also defined the concept of 'Vegas Rules' to make it clear that all discussions within the team would remain entirely contained within. After 45 minutes of being almost silent, the team finally started to open up. It started with the US teams but before long the India team members jumped in and participated. At long last, we were hearing and understanding how things really were in our team. This was going to be the start of something great. We were finally reaching our AHA moment!

Here's what the PO observed, in her own words: *"Prior to the coaching session, our team experienced challenges and dysfunctions. There was no team unity, as we were a distributed team of people residing in Texas and India. As we had never met and our tools (Skype, X) were not working, we never met face-to-face even virtually. Being sensitive to geographic cultural differences is important, in this case the highest person in the offshore hierarchy spoke for all the offshore members as he is usually trained in US cultural norms and as third party consultants, they are motivated to appease their US clients."*

Fast forward to the end of the retrospective. Now that all team members finally got the courage to speak up freely to candidly share their thoughts and frustrations, the team started to discuss options and opportunities to better accommodate each other. The new safe environment opened up the team to share without fear of retribution. Here is a summary of key points uncovered:

- The India team felt any negative comments with our US based teams would jeopardize their company's relation and since this was a significant contract they had decided to withhold sharing anything that had any potential to be perceived as negative.
- The India lead was accountable for the engagement's business relation and as such he felt he was responsible for all conversations and didn't want his team members to 'say the wrong thing.'
- Data privacy concerns restrict working conditions for offshore teams, expecting them to always be physically present in a secure room for all work and communications. No pens, pads or phones are allowed and the team is thus unable to take any notes during meetings.
- The timing of our meetings clashed with the India team's ability to eat dinner and they missed the window to purchase food from the cafeteria.
- We were pushing our India team to work late due to our meeting times. This caused them to venture into unsafe territory, as it is not safe for women there to take public transportation at night.

According to the PO: *"When Alex tried to break down the barrier of the 'lead' being the spokesman for the team and giving a voice to everyone, we realized the AHA moment from the session was how restricted those working for the consultancy services are at the expense of upsetting the client."*

Up to that point, the team had been having a hard time relating to each other. Everyone finally accepted however that a lot of the misunderstandings were due to cultural and logistical differences only made worse by the time difference. The pressures put upon the India team members to deliver that had been impeding the team were suddenly understood and appreciated by the US team. Things that had been taken for granted so far suddenly took on a new meaning. The US team members empathetically started to come up with ways to include offshore members more and increase their involvement. The Aha moment came when everyone realized the real power of hearing everyone's voice. They were finally emerging as one team. They were all jointly responsible for the same commitment and they needed to collaborate in a better way. The chains had finally been broken and the team could see a new light!

3.5 Fourth Iteration - The Light at the End of the Tunnel - How the Scrum Values Helped with Ideation

Now that the team were more comfortable with each other, they were better empowered to communicate and share ideas on how to improve. Over the next iteration, more barriers kept coming down as the trust improved. The team met together on several occasions to suggest improvements. By this time everyone was getting used to working together and we were all excited because we felt this was an opportunity for the team to re-invent

itself. We now needed to discuss how to change our working and communication styles, our meeting times, etc. to accommodate most of our team if not everyone. An idea to utilize the Scrum values to facilitate ideation became our primary focus. The team felt incorporating the scrum values would help them strive to be high performing. I was not going to disagree with that! Ensuring we used Focus, Openness, Respect, Courage and Commitment as idea generators actually helped drive all meetings that followed.

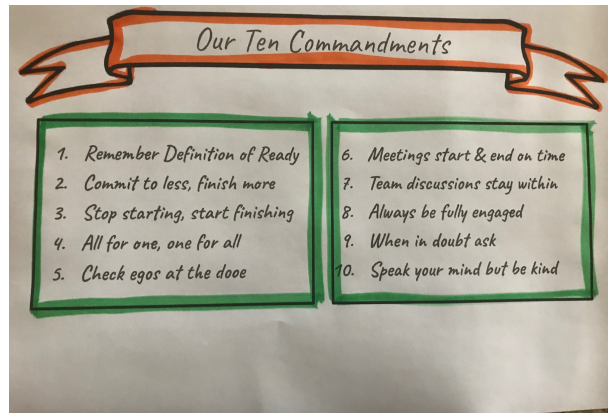
As I wanted to SM to facilitate the process, I coached her to come up with a list of questions for each value to generate a discussion and help the teams decide on any 'rules' we should create to ensure everyone observes that value. We did not care where responses were placed as long as they were captured. The SM asked the questions and collated the responses while the team voted on the items to be formalized into a working agreement. This allowed the SM to summarize what valued the most to the collective team (See Table 2).

| Scrum Value | Sample Questions | How It Is Valuable for the Team |
|-------------|--|--|
| Focus | On a scale from 1-10, how well have you been able to focus on your work? What is distracting you from your work? How can we help each other remain focused? How would the SM, PO and India supervisor help you with that? | Better clarity in the stories Finishing meetings in the timebox Shorter meetings Updating the stories following the conversations since they cannot take notes |
| Openness | On a scale from 1-10 how transparent are we as a team about how we our work? Were there any moments you felt inclined to hide true progress of your work? What would make it easier for you to share reality rather than hope? | Hearing from everyone especially working on stories Having the US teams speak more slowly and clearly Screen sharing to follow what is going on |
| Respect | On a scaled from 1-10 do you feel respected? What is each team member's contribution? Do you feel your contributions are appreciated? Any particular time you felt unappreciated or disrespected on the team? What happened and how can we prevent this from happening again? What can the SM, PO and India Supervisor do to improve this? | Confirmation of understanding by repeating what is being said Use a parking lot to table issues Ability to remote call (US), agreed to turn video on Change meeting times Catching a safe ride home Mute yourself when not speaking |
| Commitment | On a scale from 1-10, how well do you think team is able to meet its iteration commitments? What would help the team meet the commitments better? | Bite only what you can chew, commit to less Stop starting, start finishing Quickly resolve impediments |
| Courage | Are you able to speak up if something/someone is bothering you without fear of retribution? What is preventing you from speaking up? How do we improve the psychological safety within our team members so people have the courage to speak up? | Safe to speak your mind, ALWAYS Vegas rules strictly enforced More feedback from India team Speak up if you don't understand Call out someone if needed It's not personal! |

Table 2. Questions answered by the team to come to a working agreement

3.6 Fifth Iteration - Finally, Working Agreements that Mattered to All

As the list of things that mattered grew, everyone was ready to formalize those into team rules as the initial working agreements. While we had analyzed several ways to improve our observation of scrum values, we wanted to start slow and only add what everyone agreed needs to be there. We also agreed to let our working agreements be a living document, that evolved to reflect new learnings. The process was simple, each person submitted two suggestions to be considered, we dot voted, and picked the top 10, these became the team's ten commandments.



4. REFLECTIONS OF THE PRODUCT OWNER (IN HER OWN WORDS)

Kelli, our PO stated, "We were, unbeknownst to us, depriving the very people we so heavily depended on of basic amenities. Once we were able to gain clarity from teammates, which was tooth and nail, we were able to not only be more accommodating, but were able to establish some degree of trust. We were able to shift some of the working hours slightly to help accommodate the women's commute and allow for the use of the canteen. This also within a month of the working agreement session getting the team to show up to stand up punctually. Trust does take a long time to build. I would say that this day started the foundation for a closer working relationship that evolved to become very close over the course of 8 months. I would say that the biggest factor in the success of the ongoing relationship with the India team was humanizing them. After this session, and with time, we started engaging on a deeper level, taking a personal interest in them, asking how their weekend was and what did they do to celebrate X holiday. We tried different games at the beginning of stand up to get everyone talking and found that trivia was very effective. Not only were they engaged but we learned the similarities we shared, as they too know who Bart Simpson is, how they are at least as smart, if not smarter, in world geography as we are. After 8 months, I moved on to another role within my company. What was really rewarding was about a two months afterward, I received an IM from Abdul, one of the India team members, checking in with me to see how life was in my new role."

5. RESULTS SUMMARY – BEFORE VS AFTER

| | Before | After |
|---------------------------------|---|---|
| Meetings and Timeboxes | Loose, meetings rarely start or end on time. Meetings focus on ad-hoc discussions and SM updating the tool. | Meeting to start 30 minutes earlier. Timebox enforced. Focused meetings with Agenda. Tool updated by team. |
| Iteration Goals - Story Clarity | Ambiguous goals, unclear expectations, lack of clarity or refinement, clarity took long and often delayed stories completion, no definition of ready. | Sharp focus on what needs to be done and WHY. Added weekly refinement session to enhance clarity, everyone asked questions as needed - revised definition of ready. |
| Commitment & Shared Ownership | Overcommitting & under-delivering caused commitments not to be met - Us vs them mentality. | According to PO a one-team mindset led to smaller commitments which the team met better although no metrics support that. |
| Team Dynamics & Engagement | Walls between the teams, poor communication, many misunderstanding, limited engagement by team members | Humanized view of each other, all are engaged, asking questions, repeating oneself, improved communication |
| Retrospectives | No team improvements, quick meetings with minimal discussions, goal to wrap up the meeting. No action items. | Experimentation encouraged, everyone engaged, goal is to make the team better. Action items go into backlog. |
| Impediments | Many hidden impediments. Resolution taking 2-3 days to resolve once surfaced. Slow to remove impediments. | Minimal hidden impediments. Speaking freely allowed resolution in 1 day or less. Faster impediment removal. |
| SM Role | Team administrator and order taker. | Team coach and facilitator. |

Table 3. Before and after comparison of team roles, dynamics, and activities

6. CONCLUSION – WHAT I LEARNED

This story of self-discovery traced the journey of a team of geographically dispersed and culturally diverse people. It highlighted the process of how they uncovered hidden impediments to create a better working environment for their team. They reached an ‘aha’ moment that helped two distant groups align and collaborate as one team. Their arrangement was formally embedded within the team’s culture with a set of working agreements that bound them together. The following table summarizes what I learnt as their coach.

| Lessons Learned | |
|--|---|
| Working agreements can help align teams and expectations. The process helped uncover hidden impediments and enabled the discovery of new opportunities to cooperate and deliver. The journey for self-discovery became more important than the outcome itself. | The team needs to derive their own ‘meaningful’ agreements so everyone can commit to and own them. While you cannot make assumptions about team dysfunctions, use Patrick Lencioni’s five team dysfunctions as a basis to assess a team’s health. |
| Remote teams especially benefit from working agreements. They help define a one-team culture and expectations. | Leverage the five scrum values to facilitate ideation and discovery by the team on how to better live the scrum values. |
| Psychological safety is a must for strong teams. Everyone must feel safe from retribution. Sharing dysfunctions allows teams to grow. | Respect is the basis for establishing trust. Teamwork begins by building trust. Trust however, takes a long time to build. |
| Humanizing your team members accelerates building of trust and collaboration. Overcome barriers and build better relations by sharing something personal with each other. Always try to have fun, laughter is a great ice breaker. | It may take prodding to get all team members to speak and it may take longer to open up and speak honestly. Be patient. Understanding ‘who’ you are working with can help you better communicate with each other. |
| Cultural preconceptions do exist. People need to face and overcome cognitive bias. | Working agreements are a living document that may need to evolve over time. |

Table 4. Lessons I Learned as a Coach

7. ACKNOWLEDGEMENTS

As many people as I need to thank for helping me through this journey, I want to start by thanking the teams that actually grew through this process. Had it not been for them, I would not have been able to understand the power of working agreements, and that it is more about the journey of self-discovery than building words. I especially want to thank Kelli Derum, the PO for the team. I reached out to her several years later and she was as eager as ever to help. I extra appreciated the discussions we had and the time she dedicated given she just had a baby! I also appreciated the candid feedback she shared which I have included with minimum editing. Special thanks to my wife Deema who encouraged me to apply. She has always been a source of strength for me and helped me find the strength to continue when needed! Special thanks to my company and my bosses, which albeit anonymous I remain grateful to them for allowing me to share my story. And last but certainly not least, I cannot find the right words to thank my shepherd Susan Burk for her valuable support, insight and most importantly her flexibility. Susan helped me on several occasions re-invent the approach and stay focused on what matters the most. *Thanks, my Shepherd, I couldn’t have done it without you! And I sincerely mean that!*

REFERENCES

Lencioni, Patrick. *The Five Dysfunctions of a Team: A Leadership Fable*, Jossey-Bass, 1st edition (April 11, 2002)
 Scrum Guide “The Five Scrum Values” <https://www.scrumguides.org/scrums-guide.html#values>
 Scrum.org “Updates to the Scrum Guide: The 5 Scrum values take center stage” <https://www.scrum.org/resources/blog/5-scrum-values-take-center-stage>