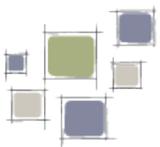


GET BETTER FASTER:

The Ultimate Guide to the Practice of Retrospectives



openview LABS!

In 1945, the managers of a tiny car manufacturer in Japan took stock of their situation and discovered that the giant firms of the U.S. auto industry were eight times more productive than their firm. They realized that they would never catch up unless they improved their productivity ten-fold.

Impossible as this goal seemed, the managers set out on a path of continuous improvement that 60 years later had transformed their tiny company into the largest automaker in the world and driven the giants of Detroit to the very brink of bankruptcy. In that firm—Toyota—the commitment to continuous improvement is still a religion: over a million suggestions for improvement are received from their employees and dealt with each year.

The key practice in the religion of continuous improvement is the retrospective review: a process of reflecting on what has been done and finding ways to generate a better outcome for customers—delivering more value or delivering it sooner. In this world view, there is no such thing as “best” practice; every practice can be improved. Nor is there any such thing as “unskilled labor”; there is only work to which intelligence has yet to be applied.

The retrospective is particularly important in the expansion stage of a business. This is a period when the firm is starting to see results and its leaders are beginning to experience the thrill of success. Yet paradoxically, the beginnings of success are often the cause of the high rate of failure. Early success can lead to overly rosy projections and over-confidence in what is currently working while underestimating the difficulties that still lie ahead.

Early success may also cause the dismissal of issues that currently look trivial but actually represent symptoms of significant trouble ahead. It can encourage the firm to put the bulk of its resources into a single business strategy that looks as though it is *the* winner rather than preserving flexibility to experiment and iterate the way to sustained profitability.

It can cause the leadership team to be trapped inside a “feel-good bubble” where bad news is avoided or glossed over and tough issues are not directly tackled. This can lead to an evaporating runway; what was assumed to be a lengthy expansion period can rapidly contract as unexpected problems cause the venture to run out of cash and time.

When done right, the retrospective review can be a powerful antidote to counteract these tendencies.

This short handbook breaks down the key components of the retrospective review. Inside you will learn why it is important, find details on how to go about it, and discover the pitfalls and difficulties that lie in the way of conducting retrospectives successfully.



STEPHEN DENNING



Author of
[The Leader's Guide To Radical Management](#)
(Jossey-Bass, 2010) and
[The Leader's Guide to Storytelling](#)
(Jossey-Bass, 2nd ed. 2011)

CONTENTS

TABLE OF CONTENTS



- 1-2** What are retrospectives?
- 3** The business benefits of retrospectives
- 4** Customize your approach to retrospectives
- 5** 3 metrics for reviewing progress
- 6-8** Expert Insights: ARCs vs. retrospectives
- 9-10** 8 tips for conducting better retrospectives
 - 11** Checklist for the CEO/executive team
 - 12** How to get feedback from your team
 - 13** How a facilitator can ensure success in your retrospective
- 14-17** Facilitator's guide/tips for successful meetings
- 18-19** How to participate in retrospectives
- 20** 11 tips to help you get the most out of your meetings
- 21** Are you reporting on your retrospectives properly?

WHAT ARE RETROSPECTIVES?

Retrospectives are periods of reflection during which a team or individual reviews and reflects on a project, action, or occurrence and asks four key questions:

- What just happened
- What went well and why
- What did not go well and why
- What can we do differently next time?

Retrospectives, and their close cousin After Action Reviews (AARs), are simple practices that offer you a quick, easy and efficient way to continuously improve. They can be formal or informal and take place after any action/project/initiative or on a regular schedule. Retrospectives can also be easily adapted to meet the needs of your organization.

Reflecting on completed work is arguably the single most important thing that any team can do for continuous improvement. It is essential to understand the nature of your performance before you can make the right adjustments to improve the next time.

RETROSPECTIVES DEFINED

If you're a company using Agile Software Development practices, your teams are probably already holding retrospectives after the completion of each sprint. Retrospectives, however, are not just for development teams.

Reflection can be a useful tool for continuous improvement for people at all levels of any type of organization, from the receptionist who answers the phone all the way up to the C-level suite.

The reflections take place upon completion of:

- a specific event
- a project/initiative
- a milestone
- a day, week, month, quarter, or year of work
- any other situation when work has been completed

Retrospectives are not project audits. Instead they seek to reveal what can be done better the next time around. They are not about placing blame and creating more work, but rather helping individuals and team members learn and improve.

An AAR is very similar to a retrospective, but while the terms are often used interchangeably, the four key questions vary from retrospective. They are:

- What did we set out to do?
- What actually happened?
- Why did it happen?
- What are we going to do next time?

AARs were introduced by the U.S. military in the 1970s and are now standard U.S. Army procedure. The Army recommends spending 25% of the time answering the first two questions, 25% of the time answering the third, and 50% answering the fourth. AARs have been growing in popularity in business environments over the last several years.

FOR INDIVIDUALS, retrospectives can be simple and informal moments of reflection.

For example, the employee who gets off the phone and thinks about what he just said and what he will say differently next time – or the employee who reviews her activities at the end of each day to determine if she has met her goals, and if not, figure out what barriers were in place that she will remove tomorrow.

FOR TEAMS, retrospectives can run the gamut from 15 minute daily or weekly progress meetings, sometimes called huddles or scrum meetings, to more structured meetings ranging in length from one-to-three hours.

The meetings follow general guidelines and are run by a person who has been appointed the facilitator. The goal is for the team members to walk away with three specific, actionable improvements.

There are three primary roles in a retrospectives practice:

1. **The CEO and executive team** -- responsible for supporting the effort, communicating its value, and ensuring that retrospectives are held regularly and results are achieved.
2. **The facilitators** -- responsible for setting up and executing retrospective meetings and following up to ensure that the changes get implemented.
3. **The team participants** -- responsible for actively and openly participating, getting the best ideas on the table, and prioritizing those ideas.

Later in this eBook, we'll share some guidelines to help each person initiate the practice of retrospectives.

WHY CONDUCT RETROSPECTIVES?

Retrospectives and AARs provide quick results in a short time and can be applied to a broad range of activities. They are simple, adaptable and scalable. Importantly, they empower individuals and teams to remove barriers together quickly and effectively.

Other benefits include:

Team-oriented

- Helps the team identify and fix problems
- Develops a team and project culture that values open and honest feedback
- Improves team cohesiveness and productivity
- Helps eliminate issues that might otherwise fester
- Helps clarify goals, roles and communication needs
- Identifies people issues as well as process issues
- Gets people to commit to making necessary changes

Process-oriented

- Provides a list of things that went well and common items to improve
- Provides better insight into operational performance
- Identifies where preventive measures can be taken to reduce project risks
- Increases efficiency of project planning and process development

Knowledge-oriented

- Knowledge gained helps avert future crises
- Establishes repeatable, successful behaviors
- Creates a knowledge-based learning culture
- Enables you to position the company as a learning entity

The level of formality of the meetings depends on the team and the company; environments can range from conference rooms to teams huddling in a work area to teams going out for pizza and beer.

A general approach for conducting a retrospective with a team entails the following:

- Assign a facilitator
- Set an agenda that provides the questions in advance
- Schedule the meeting for as soon after an event ends as possible while the experience is still fresh
- Set the meeting for one-to-three hours, with one hour often being ideal
- Ensure that all team members are present
- Ensure that everyone knows the ground rules in advance
- Everyone says what worked and why
- Everyone says what did not work and why
- Everyone offers ways to improve
- The team prioritizes three areas to improve upon (other ideas can be put into backlog)
- The team members thank and/or apologize to each other where appropriate
- The facilitator follows up to ensure that the three items have been acted upon

Method 1: **Cards**

Newer teams may be more comfortable writing their input on 3×5 cards. Next, the facilitator reads the first group of cards (what went well) and then the second (what needs to be improved). He or she then asks the group to identify themes and records them on a flip chart or other visible surface. The team votes on important themes, prioritizes them for discussion, and identifies three actionable improvement items.

Method 2: **Brainstorming Discussion**

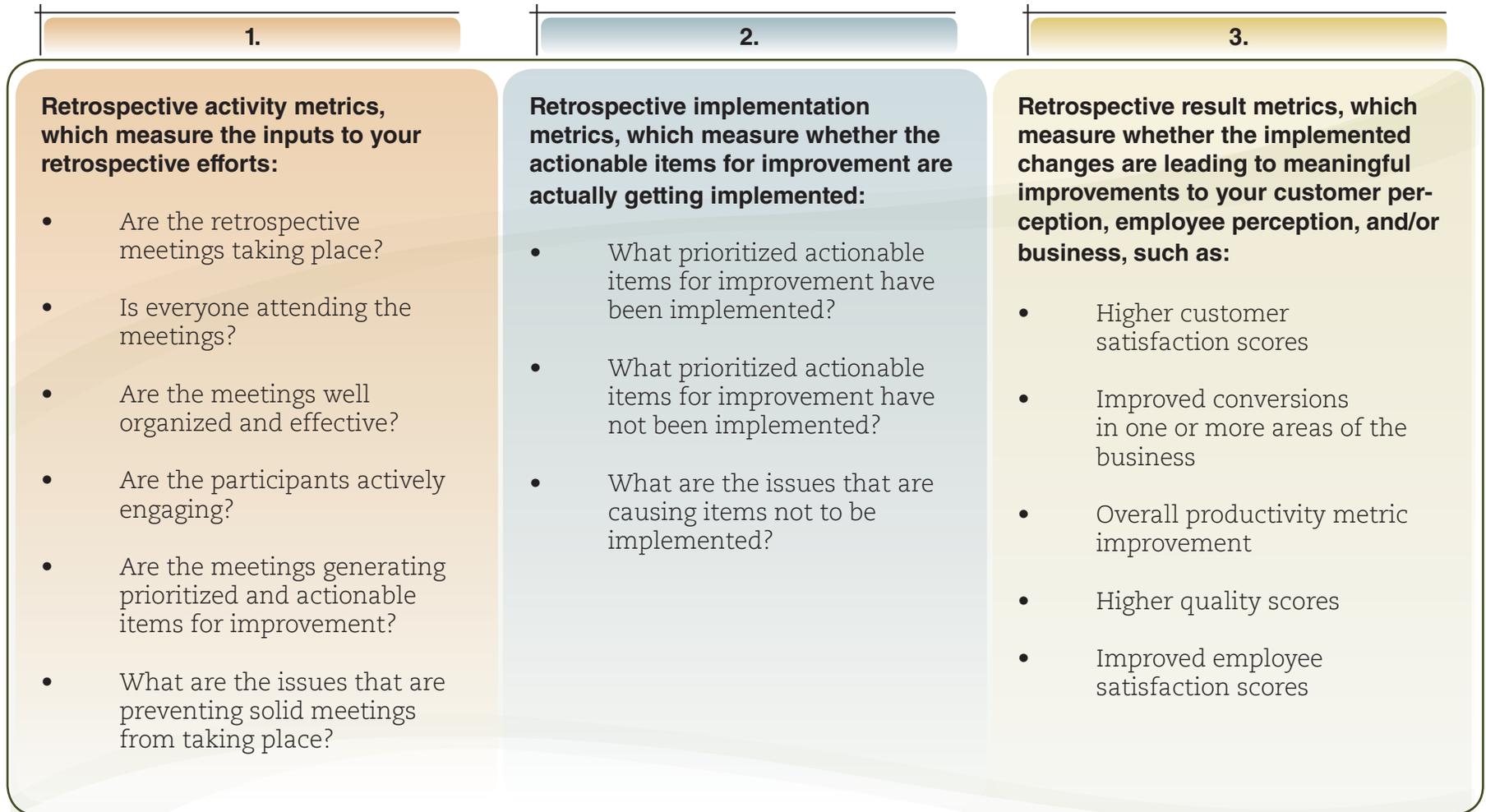
The team discusses all the things that went well and the facilitator records them under a heading entitled “pluses” on a visible writing surface. Next, the team discusses what needs to change and the facilitator records those items under “deltas.” As the discussion proceeds, the team members become inspired and offer ideas to be recorded under “action items.” The team then identifies three actionable improvement items.

3 METRICS FOR REVIEWING PROGRESS



Metrics are extremely helpful for tracking performance and gaining insights that will help you improve your retrospective practice efforts.

The metrics for retrospectives fall under three broad categories:





CHARLES PARRY

Partner

Signet Research & Consulting

Extending the value of regular retrospection by using Action Review Cycles (ARC)

A Harvard Business Review article, [Learning In The Thick Of It](#), describes the practices of a nimble, winning organization characterized by the executive editor as “likely the world’s premiere learning organization.” Key takeaway: the discipline of After Action Review (AAR) cycles can be an effective means of building organization-wide agility to the point where it becomes a competitive asset, yet AAR has been misunderstood and misapplied by many organizations seeking its benefits. Those that succeeded understood the AAR as one part of a learning discipline that strengthened their ability to sustain success.

This methodology, developed by the U.S. Army over three decades, has been successfully articulated and adapted for corporate use as the [Action Review Cycle](#) (ARC) over the last decade by [Signet Research & Consulting](#). It consists of three straightforward elements that fit into existing cycles of planning and execution. These interlinked disciplines provide a means to organically shape a culture toward ever greater accountability, coherence and resilience in facing a fast-changing environment.



What are the advantages/disadvantages of ARC?

Advantages: ARC has a broad purpose, which from its inception has been to shape a learning culture, enhance team readiness to succeed in challenging situations, and strengthen leadership skills. A sparse yet complete system, ARC can be fit into almost any repeating context where it makes sense to build an “island of mastery” of continuous improvement. In part because ARC does not require special roles (such as Scrum Master) or changes in existing team structures, time frames or decision-making, it has been successfully added into existing work flows across a wide range of industries, levels and functional areas within organizations, from executive suite to customer service call center.

Disadvantages: The down-sides of ARC are primarily found on the front end. ARC represents an investment of time which at first can be an obstacle to adoption. Still, it can be made very efficient with some practice and guidance. ARC requires courage on the part of managers to clarify [line of sight](#) and their communication of intent, pursue sticky issues that may have been avoided, and insist that action items are followed through -- in a word, lead, and not all managers are ready to embrace such a shift. As individuals increasingly choose to take on greater accountability, it tends to “rock the boat.”

How are ARCs similar to/different from retrospectives, such as those that are part of the Scrum method of product development?

Similarities: For people who are engaged in collective efforts to produce great results, AAR and Scrum retrospective meetings give structure to soliciting feedback aimed at continual improvement. Each is part of a larger iterative methodology that uses learning from recent actions to shape future results and build that into the way work is done. Both methods establish team alignment on a plan up front, then asks participants to identify what to sustain and improve immediately following that unit of action.

Differences:

Before action -- As a quick follow-up to planning, short Before Action Reviews (BARs) lay a foundation for learning through the unit of action to be harvested in the AAR to follow. The team sharpens alignment on the intent for action, makes sure lessons from the past have been applied, anticipates challenges, and articulates a shared focus it believes will be key to team success. It serves to push teams to improve both their performance and thinking, and mitigate against the natural tendency for individuals to optimize their task performance in ways that sub-optimize the overall effort. It also creates a readiness for team-level agility as conditions and information inevitably change during execution, and helps team leaders identify what sort of data will likely best inform the AAR. An essential part of effective AARs, BARs are of particular value in settings where:

- the team is not co-located
- planning was done by others
- there are multiple teams
- there are significant interdependencies
- the task is new or requires “learning our way through it”
- there is defensiveness around engaging in reviews

After action -- The AAR meeting requires more leader preparation and process discipline than most retrospectives. While AAR meetings can take several forms (fit-for-purpose), they are always framed with a focusing question or key issue to be examined, and begin with a careful comparison of intended vs. actual results. Taking a more rigorous approach than simply asking what went well and what didn't, key moments are identified that participants judge containing information that explains the gaps in intended vs. actual results (which includes “positive gaps” where they excelled.) Causal analysis is then informed by predictions from the BAR and “ground truth” data. The thrust is to improve both the thinking as well as the doing, so “lessons” or insights are translated into testable hypotheses and adjustments to planned actions. Though the customer for insights must always be the participants in the AAR, in the situation of a large project, AARs can be organized to cascade upward (line teams–project management–executive team).

EXPERT INSIGHTS: ARCs vs. RETROSPECTIVES



Elements of an After Action Review

Frame	Framing issue/question [forward focus for this meeting]
Review	Intended vs. actual results [Leader's intent, metrics, key gaps +/-] What happened [defining moment timeline]
Think	Think together to identify causes [of successes & breakdowns]
Harvest	Insight/hypothesis [action to take – trigger – prediction – rationale] Action commitments [sustain, improve, communicate]

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Clarity of intent is a cornerstone of effective action in organizations, and ARC provides guidance in how to shape and communicate it. As the first item in BAR and AAR meetings, “Leader’s Intent” establishes clarity of strategic purpose, key tasks, success metrics, constraints and guidance. ARC cycles are an organic way to keep intent refreshed and understood as it evolves throughout extended or repeating efforts. Clarity of means and ends catalyzes innovation, morale and team-level agility, and use of the Leader’s Intent format has the dual purpose of encouraging managers at all levels to keep the line of sight clear between tasks assigned and the larger organizational strategy and vision.

What are some examples of organizations that built ARC into their way of working and why did they do it?

- A.** U.S. and European markets were shifting in ways that would require a re-invention of go-to-market strategies and development of product variants matched to emerging segments and geographies. As a result, the CEO of this brand-name firm initiated an AAR process on a partially successful early effort to enter a new geography and gain specialized expertise (via acquisition of a foreign firm). Grounded in their collected insights, the executive team produced a protocol for conducting mid-course status assessments of high-risk projects, the use of which would enable them to get on the same page more quickly and continually improve their decision-making process going forward.
- B.** After developing a winning patent-protected market niche, the company founder brought in an outside CEO and company growth went into overdrive. The product-to-market process needed to become far more disciplined to handle the sheer volume of products now in the pipeline. So that execution could stay in synch with marketing and product development, and to help continually evolve their processes, these teams built ARC into their standard workflow.
- C.** A major player in consumer finance inked an alliance with a major player in another industry in order to tap one another’s customer bases and fuel a major growth spurt. Myriad elements were involved in rapidly evolving and rolling out new products, services, customer service and marketing. ARC entered the organization here as part of keeping the efforts in this highly visible strategic bet integrated and agile.
- D.** A fast-growing professional services firm, recognized three times as a Best 25 Medium Size Companies to Work For, was at a point where the founding partners could no longer manage key client sales and development informally among themselves. They introduced ARC as a way to shape long-term continuous improvement, and to help the expanding number of leaders and staff stay in alignment. They kicked ARC off as a way to tap shared knowledge and build buy-in for a complete redesign of their back-office client support processes.
- E.** The COO of a fast growing consumer products company saw a need to increase operational performance discipline – to learn rapidly from success and breakdowns alike. After Action Reviews within major expansions of distribution cascaded upward from line operators to project leaders to senior leadership. Successful practices and areas for improvement were identified and informed the next phases of the expansion of distribution centers, engineering improvements, and in further rounds of adding automation equipment. Today ARC is a routine part of the company’s SOPs for CRM, performance reviews, hiring, finance, and managing emergency response.

Resources on the benefits of ARC:

[After Action Reviews and the complete Action Review Cycle](#)



JEFF SUTHERLAND

CEO

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“The purpose of the retrospective is to identify and prioritize process improvements and act immediately to execute the top priority process improvement by incorporating it into the product backlog in the next sprint along with appropriate acceptance tests. This is called ‘Scrumming the Scrum’ and failing to do this renders the retrospective ineffective.”

WHAT IS PREVENTING YOUR RETROSPECTIVES FROM HAVING AN IMPACT?

- 1. Lack of buy-in and/or commitment from the top.** This will make your employees believe that the retrospectives are not a priority. Communicate to employees why you are doing this and the benefits you expect to achieve. Allot the proper time for retrospectives. Ensure that teams are staying disciplined with the practice and not rushing through the process.
- 2. People may perceive that reflections are about individual performance and assigning blame.** This could lead them to become overly self-protective. Reinforce that retrospectives are about team performance (not individual performance) and finding ways to improve. A key benefit is that when done right, reflections make teams stronger, not the reverse.
- 3. For many different reasons – some cultural, some managerial, some interpersonal – people won’t say what is truly on their minds.** It takes time to build a climate of trust. But if the team members fail to speak the truth, the improvements will never be as good as they could be. If there are certain people you know are not being honest, take them aside to talk in private about their concerns.
- 4. The meetings get off track.** The facilitator should set and enforce ground rules. The meetings should be structured to prevent team members from rambling and going off topic. Facilitation is both a skill and an art; facilitators need training, but they should also have a natural gift for communicating.

5. **No ideas for improvement are offered.** At Toyota, even if a project is successful, a hansei-kai (reflection meeting) still takes place. They have a saying that “no problem is a problem,” and believe that no matter how good something is, there is always something that can be improved. If the team is stuck, the facilitator can uncover problems by asking “why” many times over while discussing how a project or process unfolded.
6. **Ideas for improvement are given, but are not specific enough.** The facilitator should get the team members to make specific statements. For example, a general statement such as “we need faster service from our proofreader,” could be reframed as “our proof-reader needs to email the marked up proofs to John within 24 hours.”
7. **Too many ideas for improvement are offered.** Team members should choose three areas to focus on and immediately implement. The facilitator should put the additional ideas into an idea backlog for further discussion at the next retrospective.
8. **If there is no follow-up on the recommended improvements, the team members will question the point of the meetings.** The facilitator should follow-up to ensure the improvements have been made and report the results back to the team. All of the ideas for improvement should be recorded in some type of shared knowledge database.

Use the following checklist to ensure that this effort will have the greatest probability of success.

The executive team should ensure that all items are checked off and the corporate facilitators should ensure that the executive team is following through on the checklist.

- We believe in the value of retrospectives/AARs as a continuous improvement tool.
- We have discussed, prioritized and approved this effort as a corporate initiative.
- We have explained the value of retrospectives/AARs to our people.
- We have stressed that retrospectives/AARs are about improvement, not blame.
- We have encouraged our people to be open and honest during retrospective/AAR meetings. We are prepared to protect them in doing so and have communicated this to them.
- We have identified facilitators to guide retrospective meetings and have given them the appropriate training and tools to do their jobs effectively.
- We will meet with facilitators moving forward to ensure that at least three actionable recommendations are coming out of each meeting and that he or she is tracking what recommendations are being implemented.
- When facilitators come to us with concerns, we must be ready to address those concerns – if not, we risk losing the trust of our teams and our people. We understand that at times our teams will need us to provide them with additional tools and resources in order to make the changes they have identified as keys to improving.
- We will survey our people about their experiences using retrospectives.
- We will adjust the communication and the goals based on the results of the effort.

HOW TO GET FEEDBACK FROM YOUR TEAM



Over time, it will be important for the executive team to measure and gauge the success of the retrospectives practice.

Here are some ideas of questions to ask:

[Note: To encourage openness, give survey participants the option to remain anonymous.]

Rate questions on a scale from 1 to 5, with 1 being least satisfied and 5 being most satisfied

1. How did you feel about attending the retrospective?
2. Did the facilitator do a good job in preparing you for the meeting?
3. How prepared were you?
4. How prepared were your teammates?
5. Were the issues discussed relevant and meaningful?

Were the suggestions for improvement...

1. meaningful?
2. quickly actionable?
3. Were you honest and open in the meeting?
4. Were your teammates honest and open in the meeting?

How effective was the facilitator in...

1. keeping the discussion on track/keeping the team focused?
2. enforcing the ground rules?
3. taking notes?
4. drawing out ideas from team members?
5. Are retrospectives helpful to you?
6. Are retrospectives helpful to customers?
7. Are retrospectives helpful to the company?
8. Suggestions for improvements?

How often should we gather feedback from the team?

- After every retrospective?
- On monthly basis?
- On a quarterly basis?
- On an annual basis?

What do we do with the survey results?

- Communicate results to the company?
- Ensure that suggestions for improvement are implemented?

Use the following checklist to ensure that this effort will have the greatest probability of success.

The facilitator should ensure that all items are checked off on this checklist and the CEO's checklist as well.

PRIOR TO MEETINGS

- Meet with teams to determine last day of iteration for upcoming events that would require retrospectives
- Develop a calendar for retrospectives
- Establish meeting purpose and goal
- Invite all key participants
- Develop agenda
- Send meeting goal, agenda and ground rules to all participants
- Reserve and prepare room for the meeting (white board, computer screen, flip chart, whiteboard markers, index cards, sticky notes, cards)

DURING THE MEETING

- Remind participants of ground rules
- Review agenda
- Conduct meeting
- 25% of time allotted: What went well during iteration we are reviewing?
- 25% of time allotted: What didn't go well and why?
- 50% of time allotted: Identify and prioritize three items to improve

POST MEETING

- Summarize meeting
- Distribute meeting summary to all team members and executive team or sponsor
- Follow up to ensure improvement suggestions are being implemented

As a facilitator, you have a very challenging job.

Scheduling/arranging the meetings and sending out the agendas is the easy part. The hard part is getting the team members to:

- fully engage in the process
- be disciplined in their approach
- be open and honest in order to uncover issues and opportunities for improvement
- take their time during the process

People worry about how they are going to look or what the consequences will be if they really speak their minds. This is especially true with newer teams.

The first part of this guide contains practical advice for running the meeting. The second part contains tips for keeping your team members focused and encouraging them to get the most out of the process.

Part 1: Meeting Management

Prior to meetings

Keep a calendar of upcoming meetings and meet with team leaders to determine the appropriate time to schedule each meeting. Try to schedule meetings for as soon after an event ends as possible, while the experience is still fresh.

Meetings generally take from one to three hours, depending on the work to be reflected upon. While developing your agenda, schedule:

- 25% of the time to discussing what went well and why
- 25% of the time to discussing what did not go well and why
- 50% of the time to developing and prioritizing a list of specific, actionable improvement items

Send out an agenda to all team members one week prior to the meeting. Include ground rules:

- The meeting is about the process, not people.
- There will be no blaming or finger-pointing.
- We will be open and honest in order to truly improve the process the next time around.
- Everyone will participate.
- We will stay on topic.
- We will work together to prioritize actionable improvement items.

Ask team members to come prepared to answer the following questions:

- What worked and why?
- What did not work and why?
- What can we do differently the next time around to improve the process?

Ask team members to contact you in advance with any questions, comments, or concerns.

Prepare your materials for the meeting (white board and markers, flip chart, index cards, sticky notes, etc.).

During the meeting

There are various ways to run retrospective/After Action Review meetings. Here are two suggestions:

Method 1: Cards

Newer teams, or teams where members have trouble being open and honest, may be more comfortable writing their input on 3x5 cards. If using this approach:

1. Give members a set amount of time to write out what went well and why. Ask them to use one 3x5 card for each item.
2. Give members a set amount of time to write out what did not go well and why. Again, ask them to use one 3x5 card for each item.
3. Read all the cards to the group.
4. Ask members to identify themes and record them on a flip chart or other visible surface.
5. Ask members to vote on important themes, prioritize them for action and identify three actionable improvement items.
6. Record other ideas for improvement to put in a backlog for future discussion.

Method 2: Brainstorming

Brainstorming meetings can be a better alternative for teams whose members have built trust and are comfortable with each other. If using this approach:

1. Spend a set amount of time discussing what went well and why. Record responses under a heading entitled "pluses" on a visible writing surface.
2. Spend a set amount of time discussing what did not go well and why. Record responses under a heading entitled "deltas".
3. As the discussion proceeds, ask team members to offer ideas to be recorded under "action items".
4. Ask members to identify three specific, actionable improvement items.

At the end of the meeting, have team members thank or apologize to one another for specific things that took place during the iteration. For example:

- **Joe, thanks for getting Laura on the phone for me last Wednesday – I couldn't have stayed on track without her input**
- **Jeff, I'm sorry I was so distant when we worked on the revisions last Friday – what a week!**

Post meeting

Summarize the meeting. See the sample provided with this kit for ideas on how to capture the actionable improvement items.

Distribute the meeting summary to all team members.

Consider setting up a central folder to store all meeting notes, lessons learned and ideas for ways to improve in the future.

Follow up to ensure improvement suggestions are being implemented. If not, work with the team leader to identify any issues. If senior management support is necessary, seek out assistance from the department head.

Part 2: Tips for Successful Meetings

INTERPERSONAL ISSUES

Retrospectives/After Action Reviews are difficult for team members. People bring all kinds of interpersonal issues to the process. Maybe they have trouble speaking their mind, or maybe they are afraid that if they speak their mind someone will take issue with them. If you appreciate these difficulties in advance, there are several things you can do to help the team members during the process.

- Send out agenda and remind team members of the ground rules in advance. This importance of doing so cannot be over emphasized. Having boundaries in place to protect people from personal attacks is crucial to the process.
- Your agenda should make clear that you expect everyone to contribute. If there is someone in the meeting who can't or won't offer up an idea, ask them why. If they say "all went well, nothing went wrong," ask them why they think that was the case. Asking "why" questions is a proven technique for uncovering information.
- Observe body language. If you notice someone deep in thought, with his arms crossed, with a skeptical/puzzled look on his face, etc., ask the person, "John, what are you thinking?"
- If anyone starts to talk about a specific person's performance, redirect the conversation and remind them that we are talking about the process, not specific individuals.
- If anyone goes off topic or starts rambling, thank them for their insight but remind them that we are sticking to a very specific schedule for discussion today.

GETTING SOLID RECOMMENDATIONS FOR IMPROVEMENTS

In the course of facilitating, you will probably run into one or more of the following situations:

Issue 1: The actionable recommendations are too vague.

Solution: Ask the team members to get very specific:

- Vague: “We need to meet more often next time around.”
- Specific: “Next time, let’s meet every Friday and Tuesday morning from 9 to 10 a.m.”

Issue 2: There are more than three ideas for ways to improve.

Solution: Have team members prioritize the top three ideas to focus on. If other ideas are simple and easy to implement, by all means have the members implement them. If the other ideas will require more time and effort to implement, record them and put them in a backlog to revisit in future meetings.

Issue 3: Even after continued “why” probing on your part, the team members are still stuck and can’t seem to identify any ways to improve next time around.

Solution: Ask the members to step backward and think very simply. Results generated might include action items such as:

- Next time, we will start the day saying “good morning” to each other
- Next time, we will laugh more often to relieve stress
- Next time, at the end of each day, each of us will write down 1) one good thing that happened that day and why, and 2) one thing that we wished would have gone differently that day and why. We will bring these notes to our next retrospective/AAR meeting to help us find actionable improvement items next time around.

PLANNING FOR THE FUTURE

The benefits derived from retrospectives are cumulative in nature. Each meeting will result in actionable improvements that will become building blocks for more improvements in the future.

Over time, trust builds not only among team members, but also between the team members and the facilitators. Bring out the best in your teams by staying close to the process, by caring about the team members as people, and by taking their issues and concerns up the ladder in the company when needed.

One of the best ways to improve is to reflect upon the work we have already done and ask ourselves:

- What went well and why?
- What did not go well and why?
- What can we do better the next time around in order to improve?

Retrospectives/After Action Reviews are formal meetings where we come together as a team following an iteration of work, a milestone, a specific event, or on some other regular, scheduled basis.

Note: As mentioned previously, reflecting on work is not just for teams. As individuals, we too can reflect upon our daily work and look at it in the larger context of what we accomplished this week/ month/ year. What have we done well? What can we do better next time?

FREQUENTLY ASKED QUESTIONS

Here are some frequently asked questions related to retrospectives/AARs:

As a company, why are we doing this?

To continuously improve. How can we get better if we don't take the time to reflect upon the work we have completed and ask ourselves what we can do differently the next time around?

Who brings the meetings together?

Our company has facilitators on hand to meet with team leaders to schedule the meetings, draw up the agendas, lead the meetings, record the findings, and follow up on the actionable items.

What is expected of me?

All team members are expected to offer specific input on the three bullet questions posed on page 18. Come to meetings having already given thought as to what you want to contribute!

How long do the meetings last?

After conferring with your team leader, the facilitator will determine how long to schedule the meeting for – usually one-to-three hours.

Do I have to talk out loud?

It depends. Some meetings will be held using a card method where you anonymously write down your thoughts on 3x5 cards, which the facilitator then reads out loud to the group. Other meetings will be held using the brainstorming process, and in that case, yes, everyone must speak.

What if I say the wrong thing? What if I upset someone?

Your facilitator will remind everyone of the ground rules in advance. Retrospectives/AARs are about processes, not people. The purpose of the meetings is not to discuss who did or did not do something, but rather to talk about the process. Naming individuals, finger-pointing and blaming are not permitted.

There is something I really need to say but I just can't.

Please contact your facilitator prior to the meeting to discuss your concerns in private. He or she wants to help put you at ease.

I'm not sure I'll ever feel confident about this process.

Trust develops over time. Our goal is to create an environment where we all feel safe saying what we think during retrospective meetings. As we start to see the cumulative effects of the improvements we will achieve by exploring our work through the retrospectives process, we feel confident that teams will look forward to the meetings over time and that we will all win – not only our company, but our customers as well.

GETTING THE MOST OUT OF YOUR MEETINGS

Here are some tips for gaining the best results from your meetings:

1. Come prepared with your ideas.
2. Speak your mind – focus on the process, not people.
3. Stay on topic – if ideas for other conversations come to you, write them down and pursue them after the meeting.
4. Treat others with respect – no blaming, no name-calling, no interrupting, no criticizing of people, their actions, or ideas.
5. Keep an open mind when listening to others.
6. No idea is a bad idea. Even if your ideas seem far-fetched, throw them out there anyway.
7. Be prepared to be very specific with your ideas for improvement (e.g., rather than saying “We need to meet more often next time,” say “Next time, we should meet every Friday and Tuesday from 9 to 10 a.m.”).
8. Know that many ideas for actionable improvements may be presented. Be prepared to work with your teammates to prioritize these ideas and narrow down three items to focus on as immediate action items (remaining items will be placed in a backlog for future consideration).
9. Thank anyone you should thank or apologize to anyone who deserves it.
10. Your team has identified three specific, immediate and actionable improvements. Be prepared to go back to work and implement these changes immediately. If you encounter any difficulties in doing so, contact your facilitator – who is responsible for following up on action items – immediately.
11. Last but not least, have fun! While the process may seem a bit daunting at first, if you keep the big picture in mind – continuous improvement for all – you’ll soon see the benefits for everyone.

ARE YOU REPORTING ON YOUR RETROSPECTIVES PROPERLY



Retrospectives/After Action Reviews enable the team to reflect upon the process and offer ideas on ways to improve the process the next time around.

Here is an example report that captures the ideas provided by a hypothetical project team. Notice how specific the actionable recommendations are.

Name of Meeting	Retrospective: ABC Email Tool Improvement
Date Held	April 1, 2010
Background/Scope	Over the last three months, our team worked to improve functionality of the ABC Tool. This ARR sought to capture some of the key lessons learned. Team members were asked to identify three specific, actionable improvements.
AAR Facilitator	Name
Team Members/AAR Participants	Names
Keywords	Customer survey, redesign, email, training
Key Dates/Learning Acquired	January – April 2010
Input During Meeting	Specific Actionable Recommendations
“We need to involve a larger variety of users in the redesign process.”	Work with six customers representing each of the three segments. “We need to get clearer on user goals.”
“We need to get clearer on user goals.”	Forget about our assumptions and survey users on their actual wants and needs.
“Our users are going to need more training on this.”	Put in a request to double the budget for training both in terms of time and money.

Learn more about retrospectives from these resources:

[Seven ways to revitalize your Sprint Retrospectives by Esther Derby](#)

[Scrum retrospectives tips and tricks by Mark Levinson](#)

[Agile, Scrum: Always require the retrospective by Jimmy Bosse](#)

This eBook was created by OpenView Labs to help all companies build the practice of retrospectives into their companies. It includes checklists and step-by-step guides for every role involved so that your organization can quickly get started with the retrospectives.

ABOUT OPENVIEW LABS

OpenView Labs is the strategic and operational consulting arm of [OpenView Venture Partners](#), a global Venture Capital fund that invests in expansion stage technology companies.

MORE INFORMATION

Visit the [OpenView Labs website](#) for more ideas and inspiration for senior managers of technology companies. To learn more about OpenView Labs or OpenView Venture Partners contact us directly at:

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