DYNAMIC RETEAMING
A Strategy for Agile Organizational Design

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In this talk I'll teach you about dynamic reteaming. It's when you change up your teams as opposed to keeping them the same.

FORMING
STORMING
NORMING
PERFORMING
1977
ADJOURNING

Tuckman's Model
1965

This is the Tuckman model, which is one of the most widely-quoted models of teams in organizational development. Did you know that it was invented after Tuckman did a review of the existing literature from group therapy? That's not exactly software development, is it? Nevertheless, through the years in the software industry I've heard people referencing this model over and over. I think there is value to the model - the phases are intuitive, however, storming happens regularly on teams as we figure out complex product development. This linear model reminds me of waterfall - it was developed around the same timeframe. Based on my research, I have discovered that Tuckman neglected to mention a phase in his model.

STAGNATING

The phase that's missing from Tuckman's model is the stage called STAGNATING. It's when you keep your teams together for too long. The learning stops. It feels unfulfilling to the people.

"Stories are data with a soul."
—Brene Brown

Grounded Theory

I didn't make up the idea of stagnation. It came from the grounded theory, qualitative research I've been conducting on teams. Basically what I do is interview people for an hour on how their teams have changed. Then I transcribe the interviews, code the data for themes, and write about the themes. Brene Brown's book Daring Greatly uses this approach. She inspired me, so I'm approaching dynamic reteaming from this methodology. In the next slide is a video with some example stories, in particular, the ones that inspired the "stagnation" idea.

I didn't make this stuff up. In fact the theme of "stagnation" came up in my data. Here are a few clips from the research, illustrating that discovery. Clip 1: unless you actively have a source of new info into your teams, the learning can stagnate over time. Visiting another team or having a new person join your team can bring new learning. Clip 2: when you mix it up with people you've never worked with before, and none of your teammates have ever worked with before there are new opportunities for learning…even "hot keys". Clip 3: If the team stays stagnant, the abilities you have stay stagnant. We have people on the global engineering team for a reason, they're good at different things, so mixing them up is important.

"KEEP TEAMS STABLE FOR PREDICTABILITY"
-Scrum PLoP

mechanistic

Kai Schreiber, Nao robot demo, Jaume University.

Coming from a controlling, mechanistic stance does a disservice to the people on our teams. "Let's track people by velocity and story points. Let's turn the engineers into busy working accountants. How many hours have you remaining for your tasks today?" and the like. I prefer a lens on teams in which we seek to create the conditions in which people thrive. Their learning is energized. The teams are rockin.' The people would never even think about joining another company. They are truly excited to come to work each day. Dynamic reteaming is part of that.

ENCOURAGE FULFILLMENT & LEARNING
humanistic

Building relationships facilitates dynamic reteaming. Here is a random collection of engineers socializing at an overnight retreat. If you know and care about the people you work with, everything else is easier. Don't call me a co-worker, call me a friend. When we work together, the positivity is increased because we know each other. That might help us get through conflict easier during product development.

If you change your teams, you're not doing it wrong.

As agile coaches I remember us struggling with "best practice" advice saying we should keep our teams the same, within a very dynamic and adaptive company with high rates of change. It was almost like the feeling of "we're doing it wrong." It turned out, however, quite the opposite. I think dynamic reteaming helped us thrive as a company.

Dynamic Reteaming can be the secret to your company's success. AppFolio went public in 2015. They've grown and thrived through dynamic reteaming when I was there, which ws from one to 30 teams in engineering/product. AppFolio has reteamed out of necessity to grow the company. They are a great example to illustrate how you dynamically reteam to grow a startup into a large company. And many of the team members have done it before when at another startup where we invented GoToMeeting and GoToWebinar. You can read about this in my Dynamic Reteaming book.

Their teams are very successful at AppFolio. This team is so happy because a customer sent them cookies after they delivered a feature. The accountant that uses the feature told them that their work saved her three days of manual data entry per month. They delivered the right value at the right time for this customer. There is such positivity to this story. This is what we want - delighted customers AND teams that hear back from their customers about their delight.

Dynamic Reteaming is when you change your teams.

This is the basic definition of dynamic reteaming. The following slides dig into it more deeply.

ADD OR REMOVE 1 PERSON=RETEAM

It only takes the addition or removal of one person to have a new team system. The dynamic is different on the team with the addition or removal of one person (or more). You can notice this when a person who is highly extroverted and loud joins or leaves a team. They either bring their big personality or it leaves with them.

DYNAMIC RETEAMING
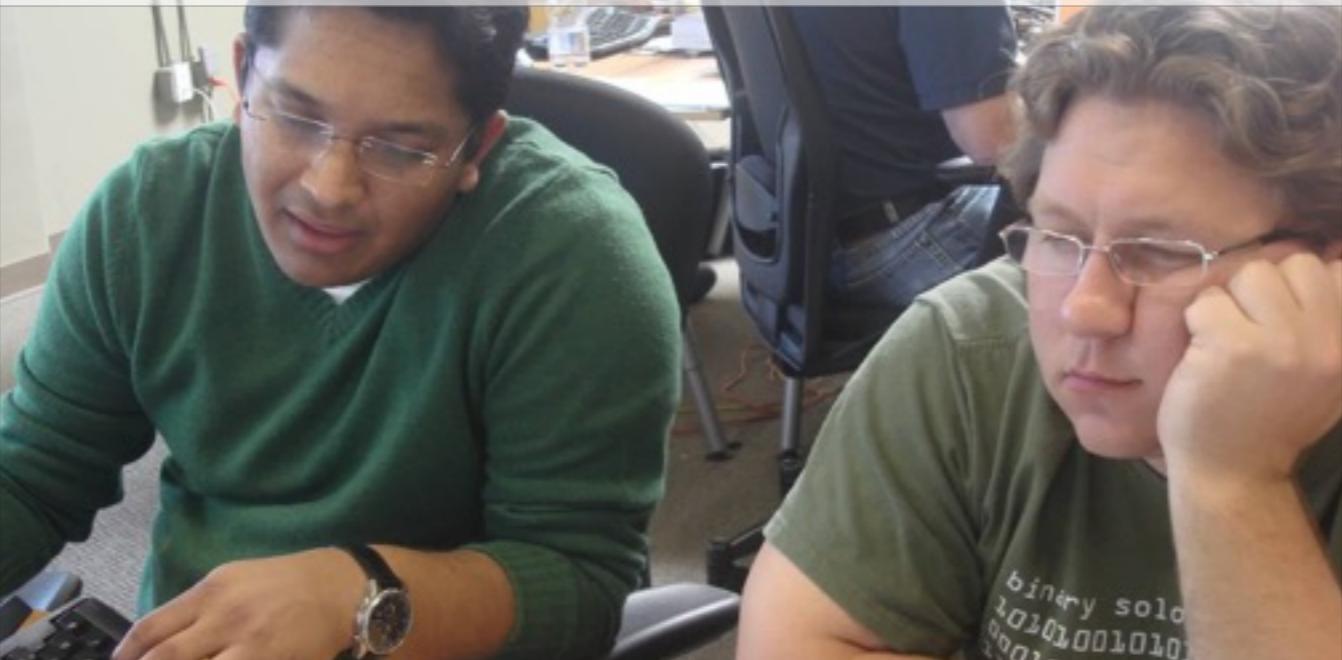
I'm not saying the you need to reteam at the fastest, most dynamic speed all the time. You can dial things up and down to meet human and business needs. Some people might want more change. Some people might want less change. The business can choose to ramp up hiring or team switching. The business can choose to slow it down as well. These are deliberate decisions. So you step on the "gas pedal" accordingly.

RETEAM THE DYNAMIC
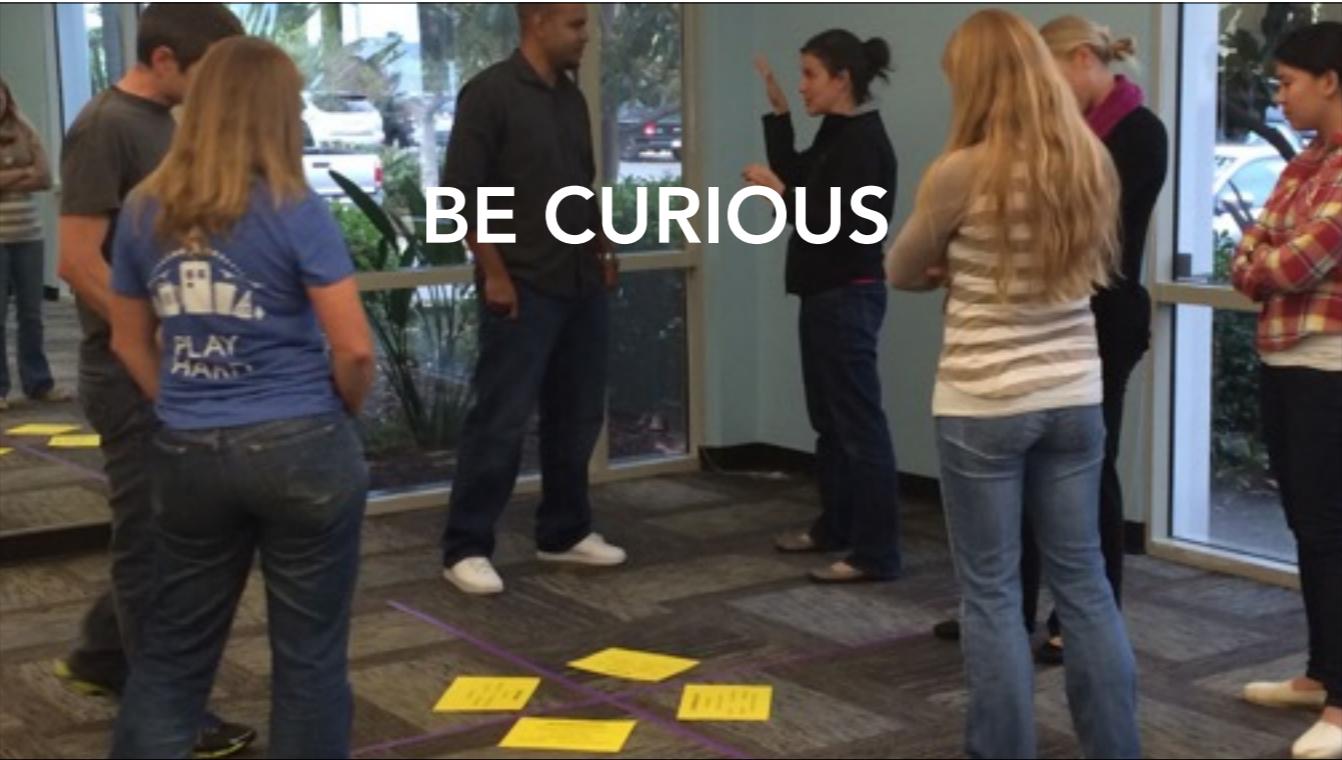
Sometimes you want to reteam the dynamic present in your teams. Chemistry is important. We don't want to keep teams together when they don't get along…this image shows an extreme.

If your teams are low energy, you might consider reteaming as a valid option. Do you want your teams to look like this? They're actually falling asleep!

BE CURIOUS

I'm not saying that reteaming is the answer to all challenges in a team or in an organization. If a team is having issues, maybe a different type of intervention is more appropriate. Here is a team working on their communication patterns and preferences with each other. What I am saying is that reteaming is an option to consider. It should be "on the list" of options to consider when facing team issues.

DON'T MESS WITH GEEK JOY

-Geek Joy coined by Mike (Geepaw) Hill

What we want are motivated and excited engineers. We want to tap into their essence to find what they love and are excited to do. As Mike (Geepaw) Hill would say, we don't want to dim their lights. We want to inspire geek joy. If the chemistry is there…and people are "rockin'" then don't break them up. Don't mess with the dynamic.

How do you reteam?

Here are some stories from some of the companies I've interviewed.

ALL GREAT ORGS REFLECT & ITERATE

What I'm sharing with you is a snapshot in time at these different companies. As time goes on, they will be reteaming differently. So take that into consideration as you hear the stories. Also, what I'm sharing is only from a subset of their companies. Great companies are like living organisms and things are happening differently across their organizations. So keep that in mind too.

RETEAM AT REGULAR CADENCE
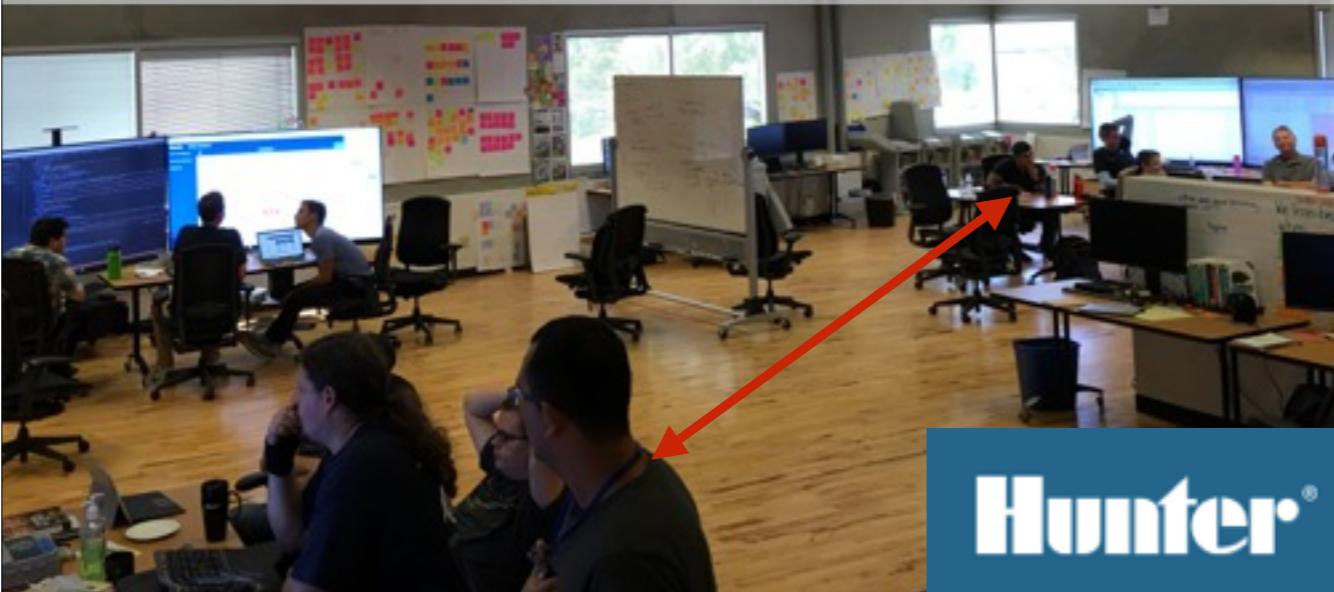
I spoke with Seth Falcon, VP of Engineering at Chef. They make devops automation tools among other things. They reteam at a regular quarterly cadence on new work themes. It works like this. A group of engineering leaders and product leaders get together to determine the important new themes and priorities for the quarter. Then, they get a product owner, engineering representative and ux person together to discuss and come up with an opportunity canvas. Next, they add on other engineering team members depending on what they need in order to develop for the theme. If a group finishes early on their theme, they may reteam over to a "pool" team at which they work on short term customer features, bug fixes. They could also reteam with other teams that have finished early and start a new theme.

RETEAM THROUGH SELF SELECTION

Kristian Lindwall, Engineering Site Lead for Spotify in San Francisco told me some interesting stories about the teams he's worked with. In particular he told me a reorg story. As you may know, at Spotify they have a structure with squads, tribes and now a higher level grouping called alliances. Each squad works on a mission. They grew fast. Kristian and others noticed some duplication in missions across different teams. It seemed like they needed to reset their teams to avoid this duplication among other things. So a group got together to figure out what to do, and they came up with a proposal that they discussed with the teams. What you see in this picture, is a board with the new missions they were figuring out. Each of the people here could place themselves within the team they wanted to work with. They had avatars that they put on the board to indicate where they wanted to be. They left this board with the team preferences up for more than a week in their standup area. After some time and discussion they formed the teams.

TEAM MEMBERS NEGOTIATE TRADES

Hunter Industries is a sprinkler manufacturer near Carlsbad, California. It's where mob programming started. I know Woody Zuill has come and spoken at Agile Iceland in the past. I visited Hunter two times, six months apart. They doubled their mobs in that timeframe. They were at first letting people move from mob to mob whenever they wanted in a very fluid way. They do continual retrospectives and learned that this continual movement was too fast for them. So now, when someone wants to move from one team to another, the individual people negotiate a "trade" with someone in the mob they want to join. Once this match is made, they tell Chris their engineering manager.

RETEAM THROUGH MENTORSHIP
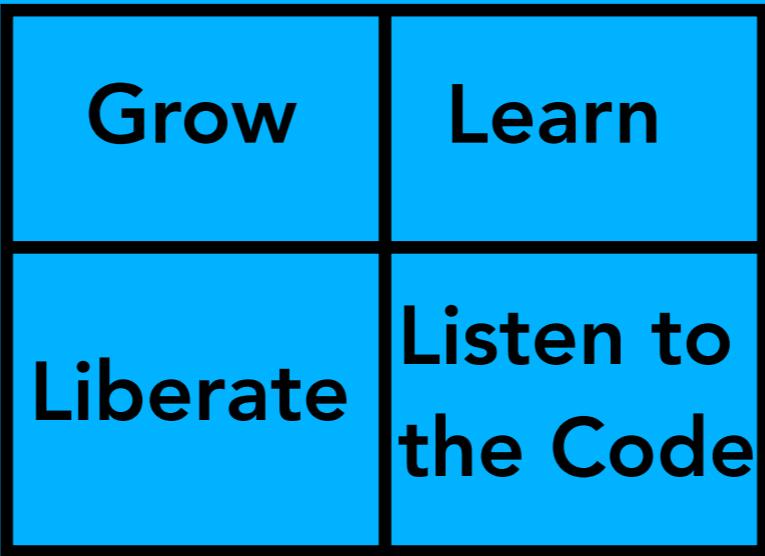
At AppFolio, our teams grew up agile with XP and strong technical practices from the start of the company. We have spread and maintained technical practices throughout the years via pair programming. When a new person starts, they are placed on a team where someone is available to serve as their mentor and "first pair." This was an excellent way to distribute the on boarding and education for new team members.

Why do we reteam?

Companies Reteam to...

Grow	Learn
Liberate	Listen to the Code

My research thus far has indicated that these are the reasons why companies engage in dynamic reteaming.

There is a business need to reteam.

GROW TEAM BIG & SPLIT

This is the "grow and split" pattern. It is emerging as a very common pattern in my research. What you do is this - you have a team, you keep adding people to it and then you split it into one or more teams. There are signals for doing this. Once you reach a certain number of people, things get slower, less efficient. How many people should you have on each team? Opinions and experiences vary. Start somewhere and then experiment and learn rapidly.

This is an application I worked on years ago at a startup called expertcity.com. I was on the web development team as a writer and then interaction designer. This was our marketplace for live tech support. If you had a tech support question, the idea was that you would come to our site, ask an expert to bid on helping you, and then you have a screensharing session to solve your problem. The product failed and was considered to be a $10 million dollar mistake by our co-founder Klaus Schauser.
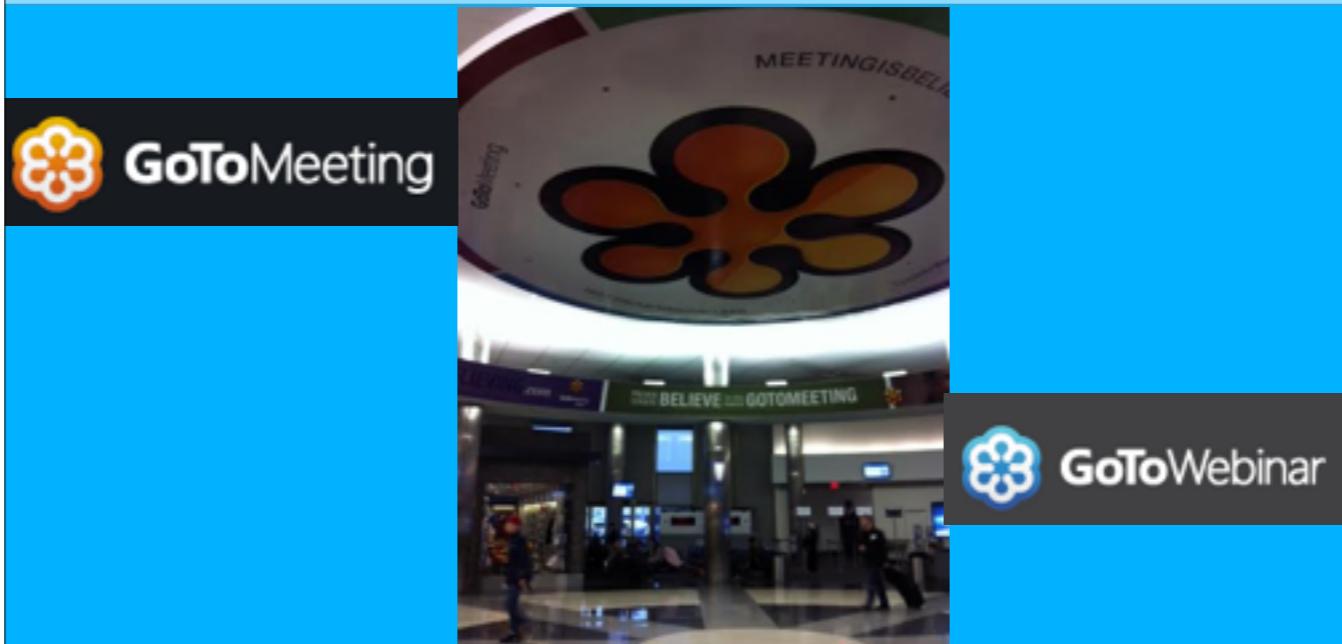
ISOLATE NEW PRODUCT DEVELOPMENT

GoToMyPC

Klaus was instrumental in the pivot that saved the company. It involved this reteaming which was taking people from multiple existing teams, putting them on a new team off to the side, giving that team complete process freedom, and telling others to leave the team alone. I was on this team as a writer. We were liberated from waterfall during this experience. This is innovation by isolation. It was a startup within a growing startup. We were not bogged down with the "standard process" that was in place for other teams. We created GoToMyPC which enabled users to see and control their computers from a distance.

THEN WE INVENTED GOTOMEETING & GOTOWEBINAR
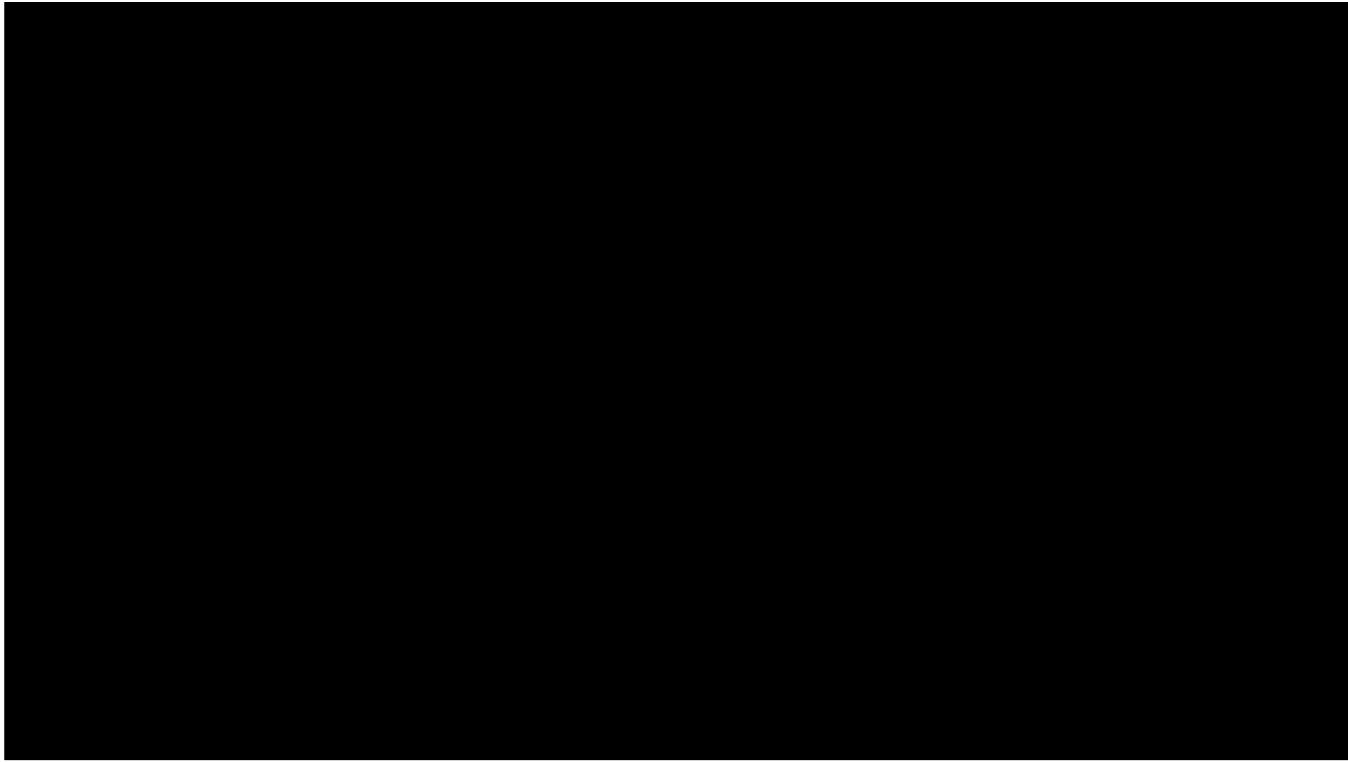
This innovation by isolation reteaming helped save the company by enabling its highly successful pivot. Our company later went on to invent GoToMeeting and GoToWebinar, and then we were acquired by Citrix. I left the company after 8 years to join an offshoot startup called AppFolio, Inc. which was co-founded by Klaus Schauser.

ISOLATE NEW PRODUCT DEVELOPMENT

securedocs™

Years later, again led by Klaus Schauser, we reteamed again in the same way to create the product called SecureDocs, which is for secure online document storage. That product wound up becoming a separate company spawned by AppFolio. You could say that this reteaming ultimately spawned this separate company! When we developed this product, an initial team was formed by taking people off of existing teams, and putting them off to the side, giving them complete process freedom. This gave the team the opportunity to have smaller feedback loops to manage the uncertainty of the work at hand. The engineer I interviewed for my study shared that the team had hourly sprints. This process freedom helped this team go faster by doing what was appropriate to them. This team was liberated from Scrum done at a 2 week cadence which was way too slow for what they needed to do.

There is a human need to reteam. For learning. For stimulation.

Here's a video with a participant from my research talking about frequent team switching to learn. At AppFolio, we grew our company via doing XP since our first team. We would switch pairs and reflect on the rate at which we switched, and would adjust that based on the needs and preferences of the team. When we grew to 3 teams, the teams started working on their own in parallel. That limited the pairing variety present on each team. Our developers voiced that they wanted to have one developer rotate from team to team on a regular basis. Doing that brought new ideas and perspectives to the team. It brought a reunion of friends who enjoy working together and who had experienced a loss from not being on the same team anymore. There were real human reasons for the importance of this dynamic reteaming. People ask me what the rate of switching was. In this video the participant tells us how that was every sprint or two - at that time we were either doing weekly or biweekly sprints. It's a decision for the developers and the business to determine the rate of reteaming - whether it's more or less frequent. And, the meaning of the word "dynamic" is connected to how people view the concept of change. So "my" dynamic might be less dynamic than your definition of it.

RETEAM & REDUCE KNOWLEDGE SILOS

To spread knowledge, we might have one engineer join a team for a couple of weeks to help educate the team on an area of the code that he knows quite well. After a while, he leaves that team. This is risk management for your company. Just like switching pairs increases knowledge redundancy, so does switching teams. People can come and go, and share their knowledge. This is like brain glue for your organization.

RETEAM TO LEARN NEW SKILLS

We switch teams to gain specialized knowledge, to enhance our learning. Tech support engineers may want to hang out with a feature team to gain knowledge to help them be better equipped to support that feature in the future. Members of feature teams may spend some time in an infrastructure or data center team to get a different type of experience, and then return to their teams. It's nice to have the opportunity to grow, develop and learn at work like this.

RE-ROLE TO GROW CAREERS, MAKE ORG STICKIER

Richard Sheridan, Chief Storyteller and Co-Founder of Menlo innovations told me a story of how an engineer became a high tech anthropologist in his company. We don't have to typecast people into roles. If we let them learn and grow, our organization becomes stickier for them, and we will likely retain them for a longer period of time because they have a new challenge.

Reteam to free people from misery.

NO MORE IRRELEVANT MEETINGS

This is me with part of a tech support team. They were an offshoot from our team that creates and maintains our datacenters. They were in a ton of meetings that they were not participating in. They were wasting their time. They were separated into a different team to only do things that made sense for their needs. If you notice silent people within your teams, get curious. Maybe a reteam is necessary to get the silenced people appropriate events and activities to help them better accomplish their own goals. There is no sense in "going through the motions" if the standup, planning and other meetings no longer have relevance to what you are working on. Bring it up or talk with a coach or manager to create a new team.

Read the emotional field.

A key message in my talk is this: Pay attention to the humans. How are they feeling? Are they excited and motivated to come to work each day? Are they energized by working with the people on their current teams as well as the work? If not, get curious. Maybe they should reteam (or have some other type of change).
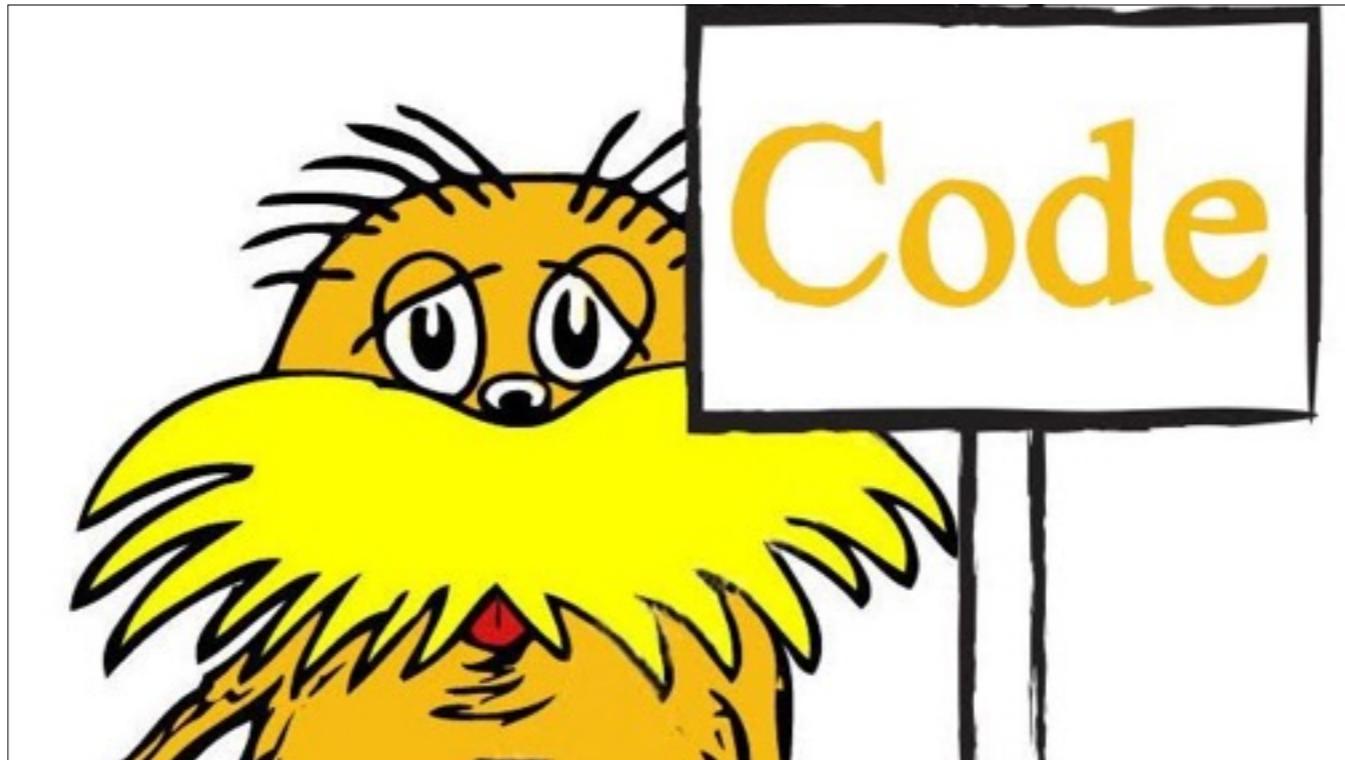
LET GEEK JOY THRIVE

-Geek Joy coined by Mike (Geepaw) Hill

If you have highly functional, healthy teams with people that enjoy the experience, AND they are delivering awesome, invigorating value to their customers, DON'T RETEAM.

Reteam
Because the
Code Needs it

THE CODE IS A VOICE IN THE SYSTEM. "I am the Lorax. I speak for the code." This guy is a character from the Dr. Seuss book called the Lorax. He speaks for the trees being cut down in the story. Here he is today saying, "pay attention to your code." What does your code need? Give it a voice. It might suggest a reteaming is necessary.

SOLVE CHALLENGE THEN DISSOLVE TEAM

We might reteam to overcome a challenge. These guys were a temporary, 2 week team brought together to resolve some performance issues for their product when it was in its infancy. They left the current teams they were on, came together for this challenge in a conference room for a couple of weeks, solved the challenge, and then went back to their teams. We listened to what the code needed, and formed a team around it. What does your code need?

"Reteaming is inevitable. You might as well get good at it."

-Nayan Hajratwala

This is my friend Nayan sharing his words of wisdom with me at Agile and Beyond in Detroit in 2016.

# Practices to Make Reteaming Easier.

ONE ON ONE COACHING
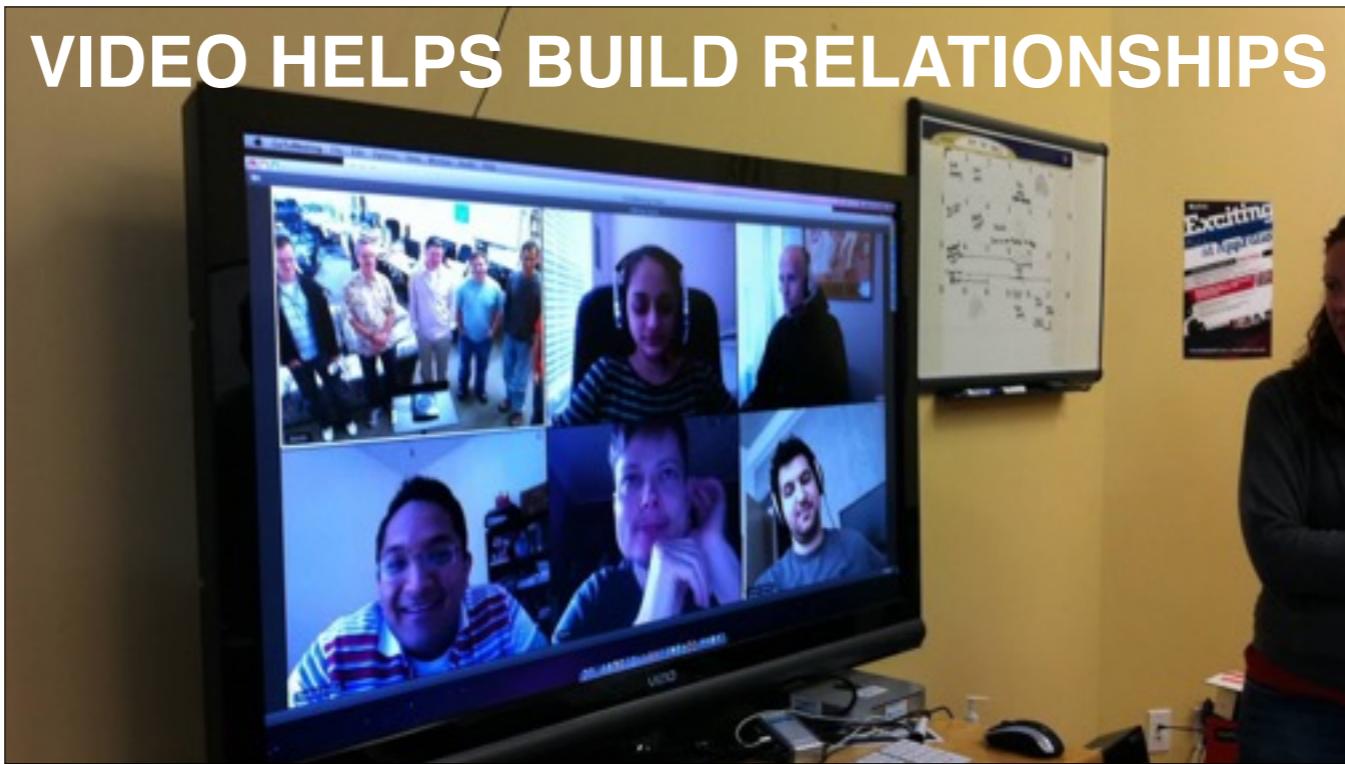
Meeting with people one on one for coaching as well as just connecting in general can help identify what the best team situation is for the person going forward. How are they doing? Are they excited to come to work each day?

TEAM COACHING

Working at the team level when they form, change and dissolve is an awesome area to focus on. There are deliberate activities you can do to support people getting to know each other and build relationships, as well as work out the logistics and dreams for ow they want to be with each other as a team going forward. Each team is different, and has different needs. Coaches can focus on multiple teams to help them build and rebuild their working preferences as they grow and change.

VIDEO HELPS BUILD RELATIONSHIPS
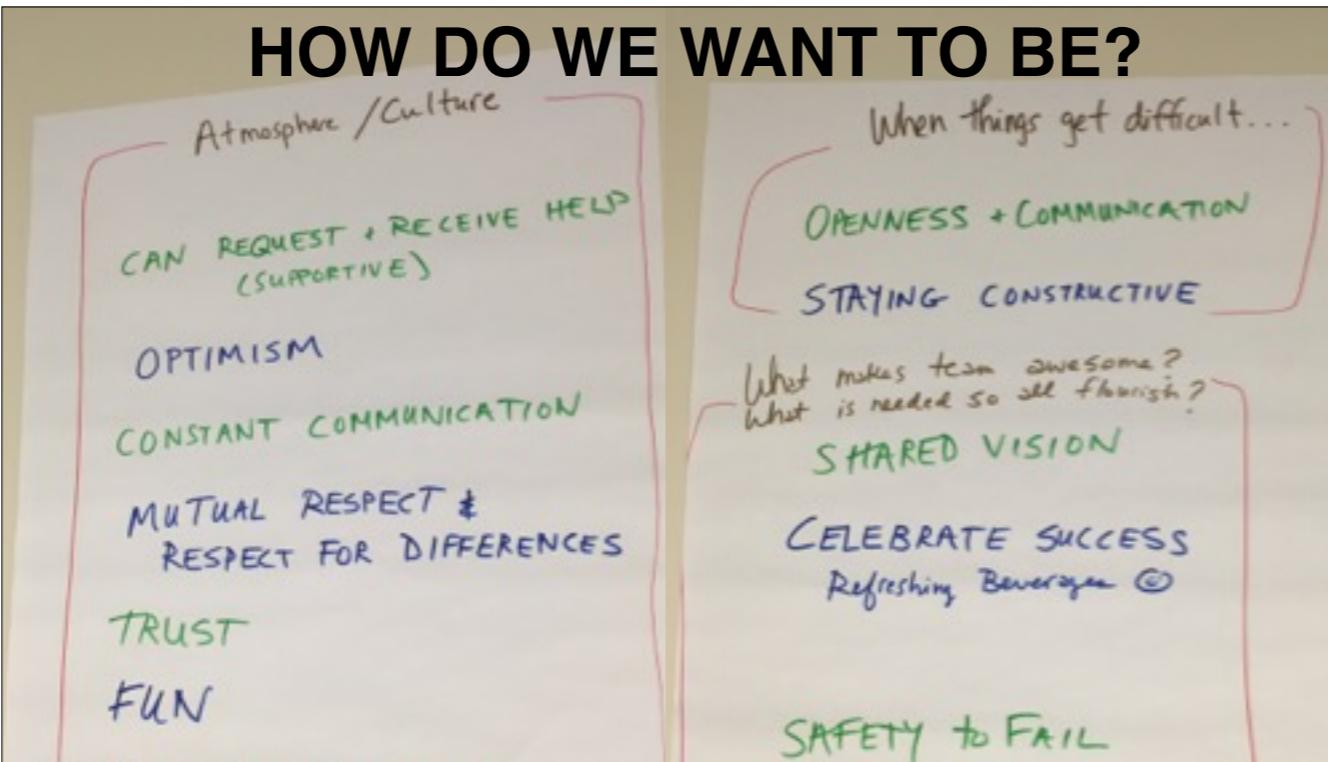
We encourage video for all remote people. Sometimes people have always on video. We carry remote friends around on laptops.This levels the playing field. If you don't see remote people on video you will forget about them. It's a huge obstacle to becoming a gelled team. If you are a remote employee, make it your priority to increase your visibility in your organization.

SHARE ABOUT OURSELVES

You can also do deliberate team resets to accelerate team gel and to lower the cost of reteaming. You can do specific things to help people get to know each other, their skills, and derive with them how they want to be and work together on a team. Give people the opportunity to champion themselves and share about themselves in a safe environment. Team members will learn things that would never have come up by chance. This team is doing the Market of Skills activity written about in Coaching Agile Teams by Lyssa Adkins.

HOW DO WE WANT TO BE?

Atmosphere / Culture

CAN REQUEST + RECEIVE HELP
   (SUPPORTIVE)

OPTIMISM

CONSTANT COMMUNICATION

MUTUAL RESPECT &
   RESPECT FOR DIFFERENCES

TRUST

FUN

When things get difficult...

OPENNESS + COMMUNICATION

STAYING CONSTRUCTIVE

What makes team awesome?
What is needed so all flourish?

SHARED VISION

CELEBRATE SUCCESS
Refreshing Beverages ☺

SAFETY to FAIL

Design alliances with teams to help the dream out what they want the climate to be like on their teams. Ask them how they would know if the had that. Get them to plan out how they want to be if they get into disagreements with each other. It's risk management for your teams.

RULES FOR LIVING TOGETHER

When we reteam, we may move to different desks. We work out the rules we want for our shared team spaces. We express the reteaming physically in this way. If you are a remote team, when you reteam the discussions like this are about when you meet, how you meet and where you meet. You can also decide which communication tools you want to use on your team.

SHARE HOBBIES

Encourage people to share their lives with each other. We are with people at work more than we are with our families and friends. Make it count. Invite this sharing. If people are reluctant, don't force them. As others share, maybe they will do the same later.

CROSS TEAM APPRECIATIONS/KUDOS
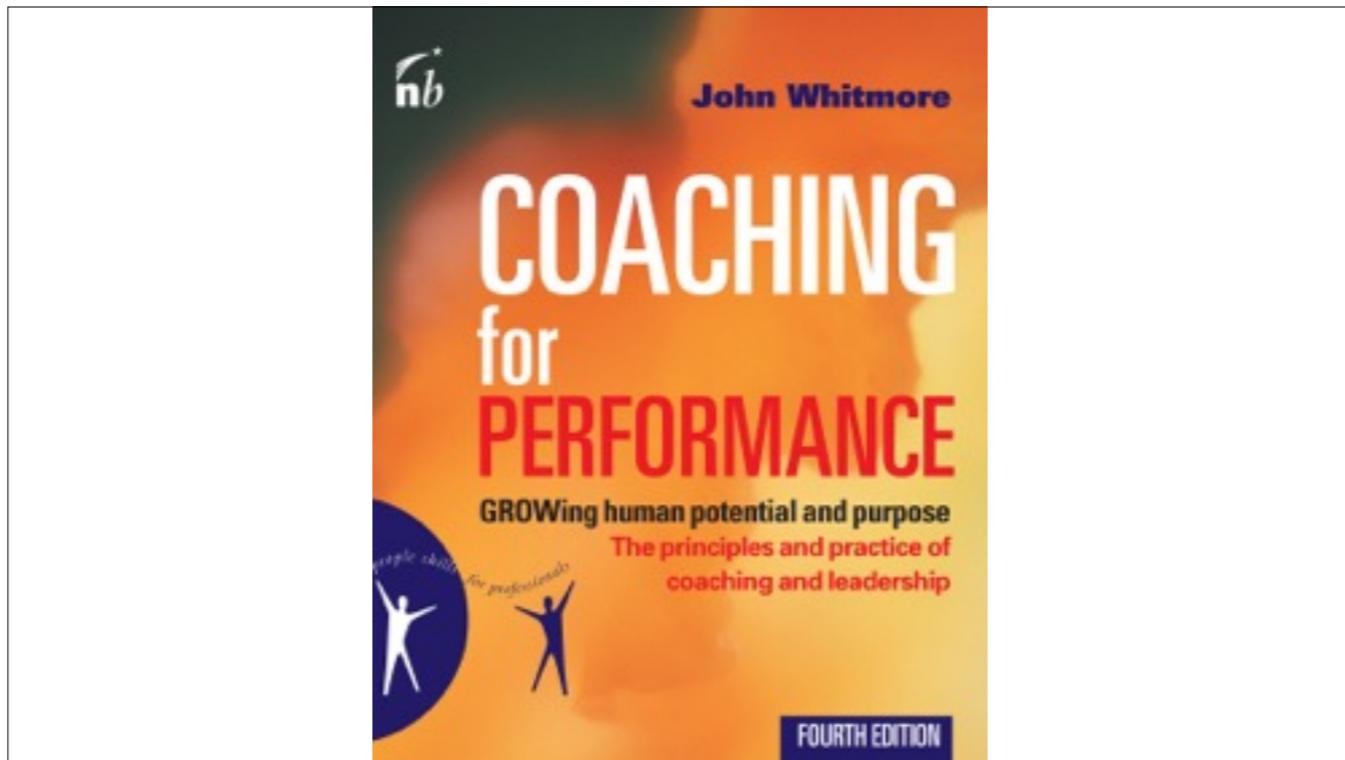
You can raise the positivity across multiple teams by using an app which enables people to send appreciations and kudos to each other. These apps can integrate with slack and other communication tools to spread the word.

PEOPLE WILL LEAVE

TALK ABOUT THAT

We leave and they find people to replace us. But we each inhabit our "roles" differently. You may hire Joe as a software engineer. When he leaves, you fill that role, but you can decide whether you want to "fill" the other "inner roles" that Joe played - maybe he was the one that brought the donuts on Tuesday. Maybe he was the glue person that made sure we all got the code integrated by a certain date. Maybe he was the one that always lightened the mood when things got tense or stressful. Having discussions about what people do apart from their formal job title is critical. This stance is from Organizational Relationship Systems Coaching (ORSC) which is a method I'm trained in.

Sir John Whitmore's book Coaching for Performance has a chapter on team coaching and he states that one of the jobs of the coach is to help the team gel as fast as possible. His work has greatly influenced my work as a coach at AppFolio. Following are real examples that I applied from this book.

COMPETITIONS

We had cross-company competitions at AppFolio - this was our avocado takedown - for this event, we reteamed into random groups and created our own guacamole to compete for best tasting, most original and best ingredient. The key takeaway from this is that you can build relationships between people with random cross-company reteamings for short term events. Then the people go back to their teams. If they work together on a project or in a team in the future, then they have already started the "gelling" process by building the relationship already.

SPORTS TOGETHER

You can have opt in sports teams that are company sponsored to facilitate crucial relationship building for later reteaming. Of course we don't force anyone to do this, but we can offer it as an option.

REMOTE OFFICE GATHERINGS

Meltwater

This awesome company Meltwater makes it a priority to get their global teams together for a few days of learning and camaraderie that you can see in this photo. The team just finished bowling. They are from offices in the US and across Europe. They are primed for later reteaming and better collaboration since they had this shared trip together.

RETEAMING WILL HAPPEN

HOW WILL YOU RESPOND?

It's just a fact. People will come and go from your teams. You can choose how you respond. You can celebrate when people leave. Honor what they did. Understand what is "leaving" with them so someone else can take it over. You can deliberately speed up the team gel when new people join your team, or when you have different degrees of team switching. Get good at this.

YOU CAN CATALYZE YOUR OWN CHANGE

Besides changes happening to you, such as reteamings, you can also catalyze your own team changes, company changes, job changes and more. I did an open space at GoDigital2016 that I called Draw Your Life. People visioned out the direction in which they want their lives to go. It's a very powerful activity and it results in positive, self-directed change. You can do it too! Contact me heidi.helfand@gmail.com and I'll add you to an online version of this.

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