PETIT MANUEL DU STAND UP MEETING…

(M.-Cl. Audétat & C. Voirol)

Quelques infos recherchées sur internet

1. **De quoi s'agit-il ?**
2. **A Core Practice for Self-Organizing Teams**
3. **Comment ca marche concrètement?**

De quoi s'agit-il ?

Une réunion… debout. L'idée peut paraître étrange mais se débarrasser des tables et chaises a un véritable impact sur l'attention. Pour de petites réunions quotidiennes, cela peut être la solution idéale pour gagner en productivité.

Le stand-up meeting nécessite juste un espace suffisant pour former un cercle. Dans cette position, tous les participants ont la même importance ; il n'y a plus de « supérieur » en bout de table. La forme est particulièrement adaptée aux bilans en équipe, où chacun prend la parole. On peut y évoquer les évènements importants de la veille et les objectifs principaux de la journée.

Ce genre de réunion est tout à fait adapté au début de journée. En veillant cependant à ce qu'elle ne soit pas considérée comme le lancement de la journée : le temps pré-réunion deviendrait vite un moment de pause.

Un stand-up meeting bien mené permet d'avoir une vision générale de l'avancée de chacun, mais aussi de faire ressortir les problèmes rencontrés. La réunion doit permettre de chercher une solution ensemble, même si elle n'est pas trouvée immédiatement. L'important est de pouvoir exprimer les difficultés.

L'idéal est de se passer d'une personne qui « dirige » la réunion, afin d'en faire un moment d'échange constructif où personne ne craindrait de donner son avis. Cependant, il peut y avoir un responsable du bon déroulement de la séance, qui peut d'ailleurs changer régulièrement. Cela nécessite évidemment une préparation de la part des participants… et une capacité à aller au fait. En cela, le responsable de la réunion peut jouer le rôle de modérateur pour recentrer les discussions.

La station debout empêche l’avachissement progressif des participants, qui se désintéressent rapidement de ce qui se dit. Une position plus dynamique renforce l’attention. Elle encourage aussi à dire les choses rapidement et clairement : il est très inconfortable de rester debout trop longtemps. Pour cela, mieux vaut ne pas trop faire durer les stand-up meetings. Autrement, les auditeurs risquent de se concentrer plus sur leur incommodité que sur la discussion. 15 minutes semble la durée maximale.

Pour peu qu’il soit bien géré, un stand-up meeting peut contribuer à la cohésion de l’équipe et dynamiser la réunion.

The Daily Stand-Up Meeting - A Core Practice for Self-Organizing Teams

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The transition to becoming a self-organized team involves a fundamental change in how individuals, teams, and management approach their respective responsibilities. Traditionally managed teams depend upon anointed leaders who give direction, track progress and push the project to completion. Self-organized teams operate quite differently, and in such a team there is no explicit or implicit role of “project leader” or “project manager.” In the context of a self-organized team, this article describes how to implement the daily stand-up meeting.

Replacing 'Status Meetings' with 'Stand-Up Meetings'

Stand-up meetings are most commonly associated with agile development methods (in particular eXtreme Programming and, more recently, Scrum), but these type of meetings are not inherently agile. Indeed, this type of meeting can prove useful in any environment where teams have some degree of self-management.

When it comes to bringing new practices into a team, old habits die hard. I know, because I’m still in the process of relying less upon some traditional project techniques (that have helped me lead a few hundred projects) and replacing them with practices that have a good chance of improving project success rates. One practice in particular has been a struggle to consistently implement successfully: the stand-up meeting. Repeatedly, across a period of several years, I’ve encouraged project managers in my organization to adopt stand-up meetings. Yet in far too many cases, these meetings inevitably become a typical status reporting meeting chaired by a project manager. Those project teams, unfortunately, don’t achieve the benefits that can result from the stand-up meeting; indeed, their performance and potential is somewhat capped by the command and control model of a traditional status reporting meeting.

This article reflects my notes on the daily stand-up. I’ve prepared this information primarily for use in my discussions with project teams who are starting to use stand-up meetings or who might need a refresher because they are struggling with ineffective stand-up meetings.

Of course, I've had lots to draw upon - I'll recap some of the basics of the daily stand-up (providing you with references to this same, or very similar, information that is widely available elsewhere) and talk about enablers for successful stand-up meetings.

Preparing for Successful Stand-Up Meetings

Perhaps you've heard about stand-up meetings and want to implement them on your project. As a team member or leader, you may be tempted to initiate regular stand-up meetings by simply putting the meetings on the calendar, introducing the "three questions" and imploring each person to answer each question during the stand-up meeting. I have used and have seen others use this method and the results are consistently disappointing: dysfunctional stand-up meetings that uniformly frustrate. The process fails to engage most team members, the potential benefits of exchanging information are rarely achieved, and regular voluntary attendance by team members rapidly diminishes.

Instead, consider this approach to introducing stand-up meetings:

1. **Introduce team members to the *objectives* of a stand-up meeting.** Start breaking the mindset of the familiar report-status-to-the-project-manager meeting.
2. **Train team members in the *practices* of the stand-up meeting.** You'll want the entire team familiar with the small set of rules governing these meetings. Without this common understanding, you'll find that your stand-up meetings will soon become unproductive.
3. **Determine the key logistics and specifics of your implementation of stand-up meetings.** Are you actually going to be standing? Fines or later arrival? Along with several other start-up choices.
4. **Ensuring an efficient, effective daily stand-up meeting.** After you've conducted a few stand-up meetings, go through your first retrospective discussion and repeat that activity in a few weeks, deciding collectively what aspects of your own implementation should be continued, improved or abandoned.

1. The Stand-Up Meeting . . . What's it All About? The Meeting Objectives.

Successful project teams adopt various methods for keeping team members in sync with one another, identifying problems that others on the team can help resolve, and ensuring that progress is continually made towards achieving the project goal.

Your current projects probably employ some formal methods (generally involving written materials) and informal methods (hallway conversations, project discussion boards). Traditionally, a weekly 'status meeting' is the primary vehicle used by a project manager to drive this type of team activity; this status meeting is a chance to brief the project manager on progress relative to the plan. Typically, the project manager has to listen carefully and ask probing questions with a goal of understanding progress and identifying issues. The project manager has an implicit responsibility of detecting project issues and driving their resolution. The politics of this interaction can, in some situations, cause team members to report “all is well” when, in fact, a serious problem is preventing progress as expected – such cases introduce risk to the project.

A stand-up meeting is quite different from a weekly status meeting. The key objective for a stand-up meeting is to ensure that the activities of each team member are aligned in progressing the project towards successful completion of the project goal. In other words: the stand-up meeting is when each team member re-validates that they are properly allocating their time on the most important project activities.

A stand-up meeting is:

- An explicit reinforcement of the commitment by each team member to accomplish a goal
- A means of dynamically adjusting the work by each team member to accomplish the goal
- A daily synchronization between team members, informing team mates of work activities, progress and issues
- A method of cross-checking progress with team mates
- An accountability mechanism that has each team member accountable to other team members for their responsibilities
- A visible demonstration of the ability of the team to self-manage their project responsibilities

A stand-up meeting is not a status report to a project manager, project leader or management. (Please re-read that thought one more time, it is important). Other status reporting meetings can provide this function of reporting progress outside of the team, but that is not the function of a stand-up meeting.

2. The Practices of a Stand-Up Meeting

Stand-up meetings seem to go by two names these days: A *Daily Stand-Up Meeting* and *Daily Scrum Meeting*. I’m sticking with “Daily Stand-Up” because I see this practice as being applicable to many situations that may or may not be associated with use of Scrum. You can find expert materials defining the Daily Stand-Up all over the internet and published books.

The defined practices for a stand-up meeting are few, but are significant. Don’t get overly enthusiastic and start constructing a plethora of additional practices for your project – too much process will negate the benefits and turn this into just another inefficient use of time.

From the Scrum Guide, here’s the definition of a daily scrum:

	The Daily Stand-Up Meeting
1.	**The stand-up meeting is conducted daily.**

2. **The meeting time-box is 15 minutes.**
3. **All team members attend and participate. (Others may attend, but do not participate.)**
4. **The Development Team is responsible for conducting the Daily Scrum (not the Scrum Master)**
5. **Same time of day and meeting location for all meetings.**
6. **Each team member presents three topics (my wording slightly differs from the Scrum Guide):**
1. **What I have accomplished since the last meeting.**
2. **What I am going to accomplish before the next meeting.**
3. **What obstacles are preventing progress.**
7. **A trainer/facilitator (in Scrum, this is the ScrumMaster) teaches the team about the stand-up and enforces the process.**

You are no longer relying on a Project Manager to ask a collection of questions so they can discover if there is a problem on the project. The stand-up meeting places a significant obligation onto each team member to:

- Be responsible for your work.
- Concisely present an accurate view of your work.
- Pay attention to other team members and note items that you'll need to cover in follow-up discussions.

Here are a few points of guidance that may help you in understanding and implementing these practices:

1. **The stand-up meeting is conducted daily**: You may be familiar with the quote from Fred Brooks "*How does a project get to be a year late? … One day at a time.*" (The Mythical Man-Month: Essays on Software Engineering, 1975 & 1995. Page 153 in the 1975 version that I have). An effective daily team meeting will let you know when the project is even one day behind schedule.

o Here's why you'll want to meet daily: Project teams almost continuously make new discoveries and encounter unexpected situations. If not properly acknowledged and addressed, this new information can jeopardize the project. The daily meeting is the time to highlight any relevant new information (perhaps identified as 'obstacles') so the team can make a proper response by adapting the project activities with this new information in mind.

o Is this micromanagement of the project? It might be, but micromanagement generally refers to overly detailed management by an outside authority. The daily stand-up is self-management by team members, each with a stake in knowing that the other team members are making sufficient progress on their area of responsibility.

2. **The meeting duration is 15 minutes**: The 15 minute duration is deliberately short so everyone will be able to accommodate this meeting on their calendar and attend every day.

- This is a synchronization meeting, not a time for extended discussion, philosophizing, storytelling or problem solving. It is far too short to probe into the details of a problem or try to solve that problem – problem solving activities later today are a natural and expected follow-up to today's stand-up meeting.
- Don't succumb to any temptations to cover other information as this will only serve to extend the meeting duration without contributing to the stated purpose of the meeting. Purge any desires you may have to tell a story about how difficult your job is, give a history of how we got into this situation, offer your criticism of other people/organizations or take time on other topics not on the agenda.

3. **All team members attend and participate.** (Others may attend, but do not participate.) You'll know if you are on the team if you can answer yes to this simple question: are you performing some activity or producing some deliverable that contributes to the project goal?

- This is a key synchronization activity for the project team, and will work best when all team members attend. It's reasonable to assume that each member might occasionally miss for unavoidable reasons
- You'll want full attendance to be the result of the recognized value of the stand-up, not as a result of penalties assessed for absence or late arrivals.
- Others may choose to attend the team's daily stand-up as observers. Their interference (no matter how well-intentioned) will probably break the team's 'rhythm' and detract from the value of the daily stand-up. Recognize the case where an 'outsider' is actually a team member and should be participating along with every team member in these daily stand-up meetings.

4. **Same time of day and meeting location for all meetings**. This is probably a good idea in establishing a regular pattern of interaction within the team, but I have been in situations where we have diverted from this practice without any negative impact.

   1. The overarching principle is that the stand-up meeting be conducted at a time and location that will allow all team members to participate. Some teams prefer a start-of-day meeting, others a mid- or end-of day meeting. Look at the advantages/disadvantages of each and choose whatever works best for your team.

   2. If you are fortunate enough to work within a team that is entirely co-located, then you'll need a physical room in which to meet. You'll be occupying that room every day, so try to get a room that is suitable.

3. My projects for the past decade have had team members on two or three continents; thus, we’ve had to find a workable solution for a team that spans multiple time zones. We've found audio conference bridges to be more reliable than any form of video conferencing, but the use of audio-only conference bridges introduces a number of complications that you'll need to work through.

4. Start and end on time. Set the expectation that everyone is responsible for arriving in time for the start. Accompany this with the commitment to one another that the meeting will conclude on time. If you continually start late, it will be easy for everyone to adjust to this and start arriving late. A late running meeting creates a problem: people who leave at the scheduled end-of-meeting time will miss out on the remainder of the meeting. If the meetings continually run late, then this will likely become a source of dissatisfaction and complaint – not quite the image you’d want for an important synchronization meeting.

5. **Each team member presents three topics.** *This single aspect of the stand-up meeting is the most difficult to implement effectively*.

- Have the output of your planning activities available to all team members during the stand-up meeting. You'll probably have this information posted on the wall of the meeting room (or electronically displayed from a project Wiki site). This is everyone's reference point, and is essential for meaningfully representing your progress and obstacles. For those of you using Scrum this will be your sprint backlog & sprint backlog burndown chart.

- You are presenting progress information in terms that are meaningful to the other team members. Your audience is everyone else on the team – remember this is not a status report to a ScrumMaster or project manager. Don’t let this become a meeting where someone has to ask probing questions in order to get a satisfactory understanding of your true situation.

- When you are not presenting, you have an explicit responsibility to pay attention as others present. You’re listening for connection points to your own activities and areas where you may be able to help.

- There are numerous variations on the three topics/three questions. My version implies a focus on accomplishment and a responsibility of each team member to present their information. The nuances in the various alternative words of the three questions sometimes cause problems when stand-ups are initially implemented on a project. Don't get hung up on these wording differences, but beware of these pitfalls:

  - Reporting on what you are 'doing' rather than what you are 'accomplishing.' Accomplishments, not just activity, are expected.

  - Treating the topic as an interrogatory (e.g., "What did you accomplish yesterday?") rather than a self-initiated report ("What have I accomplished since the last meeting?"). The former question is phrased as though someone is asking the team member for a report on their progress, thus carrying the implication that someone is pulling information from the presenter.

- Sometimes the third question is worded "Are there any impediments in your way?" This yes/no question will always beg a fourth question asking “What are those obstacles and their impact?”

6. **A trainer/facilitator (in Scrum, this is the ScrumMaster) teaches the team about the stand-up and enforces the process.**

o Have all team members read some materials (e.g., this article and the expert materials it references) and conduct a training session to reinforce the objectives and practices of the daily stand-up.

3. Determine the key logistics and specifics of your implementation of stand-up meetings

Other stuff for your team to decide so the stand-up meetings work best for you:

- **Standing up**. Do you actually need to stand up? Probably not.
- **Fines for arriving late**. Some teams do this. I think it's silly - seems like the fine just gives me permission to be late.
- **Expectations on attendance**. “At all costs” or “Attendance is expected, occasional absences are tolerated.”
- **Speaking order**. Define an algorithmic means of choosing the first (and then the next) speaker. Avoid a facilitated method that has someone (e.g., ScrumMaster) who runs the meeting – this method too often becomes a ‘report to the leader’ meeting. For first speaker, some possibilities are: person closest (or farthest) from some point in the room (e.g., the door, a window, the light switch); first person to arrive in the room; person who volunteers by occupying a designated ‘first speaker’ position in the room. Some possibilities for the order of presenters: clockwise, first to volunteer, or current speaker selects the next speaker.
- **Positioning of team members vs. others**. It can help reinforce the focus of the meeting if team members are positioned together, with all other attendees on the periphery.
- **Interactions during the meeting**. If a presenter has been unclear on some point, you may want to provide a limited opportunity for clarification questions. Or, is your daily stand-up meeting just a 'present-only' meeting with no opportunities for questions?
- **Action item recording**. Some teams assume that individual team members record and act on their own actions that emerge from the daily stand-up meeting while others have a designated individual assigned to record action items and track their completion.
- **Sharing information on obstacles**(the third question). When describing obstacles are preventing progress, you'll want to establish a team norm for what is presented here. You have two obvious possibilities:

o Each team members presents only those obstacles for which assistance is needed.

- Each team members presents all notable obstacles, including those that they can resolve. Consider sharing this information if it is likely that others would have suggestions that would be helpful.

4. Ensuring an efficient, effective daily stand-up meeting

For teams accustomed to traditional project management status meetings, the daily stand-up meeting can be a challenge to implement. The daily stand-up meeting is far to short for extraneous discussion, and it can seem all but impossible to give an accurate report in just a few minutes. Yet, with preparation, practice and discipline, the daily stand-up meeting can be one of the more important team interactions.

Prepare the team by going through the first three steps, noted above, and then get started with your daily stand-up meetings. After you've conducted a few stand-up meetings, go through your first retrospective discussion. Decide collectively what aspects of your own implementation should be continued, improved or abandoned – have a definition of the stand-up meeting practices (section 2, above) available for reference during this retrospective. Repeat this retrospective activity after about a dozen stand-up meetings; from that point forward, just include the stand-up meeting as a topic covered during your standard iteration retrospective.

Comment Ça marche concrètement

Formats Communs

La plupart des personnes sont familières avec **le format standard Scrum**. Vous faites un cercle et chaque personne de l'équipe répond à trois questions :

1. Qu'avez-vous fait depuis la dernière fois ?
2. Qu'allez-vous faire aujourd'hui ?
3. Rencontrez-vous des obstacles pour progresser ?

Une autre approche consiste à poser les questions suivantes :

- Qu'ai je **terminé** depuis la dernière fois ?
- Qu'est ce que je vais **terminer** d'ici la prochaine fois ?
- Quelles difficultés je rencontre ou je vois venir ?

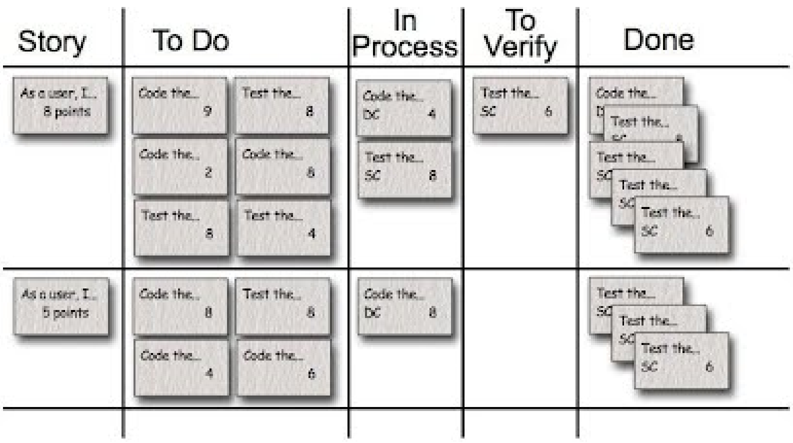
La chose très positive de ce format est qu'il fait participer chacun, ce qui construit l'esprit d'équipe. De plus, il est facile de découvrir si quelqu'un a un problème. L'inconvénient est que l'on parle plus des personnes que du travail. Et cela peut devenir assez consommateur de temps et répétitif pour une équipe plus grande.

Un autre format, souvent appelée **« Walk the Board »** (Parcourir le Tableau), est devenu populaire ces dernières années. Il déplace le focus des personnes sur le travail en lui-même. Il est adapté de l'approche « Lean Manufacturing » et a été conçu pour traiter un travail couvrant beaucoup d'équipes ou de plus grands groupes de personnes.

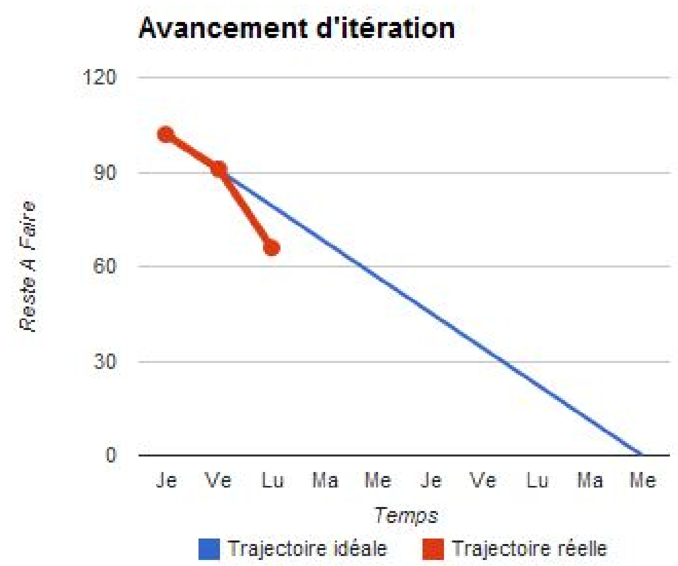
Voici comment format « Walk the Board » fonctionne

Au lieu de parler à tour de rôle, l'équipe commente les « stories » (histoires) qui sont actuellement actives. Pour chaque histoire, les personnes qui travaillent sur cette histoire, ou quelqu'un prenant la responsabilité de l'histoire, aide chacun à comprendre ce qui se passe avec elle. Il est particulièrement important de se concentrer sur ce qui empêche une conclusion rapide.

Cette façon est beaucoup plus rapide parce que le nombre d'histoires actives devrait typiquement être bien moindre que le nombre de personnes. Si vous travaillez vraiment efficacement, il devrait y avoir seulement une ou deux histoires actives. Aussi, la conversation se concentre sur le processus de travail et non de savoir qu'untel a un mal de tête. L'inconvénient est que tout le monde n'arrive pas à parler hormis les personnes les plus engagées ou dominantes dans l'équipe. Les personnes intelligentes mais réservées sont laissés à l'écart. Cette approche rend aussi difficile de découvrir si quelqu'un a besoin d'aide supplémentaire ou de support pour réaliser leur travail.



Pour connaître votre avancement, vous allez avoir besoin de tracer le **Burndown Chart** du sprint en cours. Ce graphique est simple, il s'agit du tracé de la charge de travail restante (généralement en heures) en fonction du temps (en jours). Pour tracer ce graphique, il suffit de mettre à jour (lors de chaque mêlée quotidienne par exemple) le **sprint backlog** (voir illustration).



Exemple de Burndown Chart de Sprint