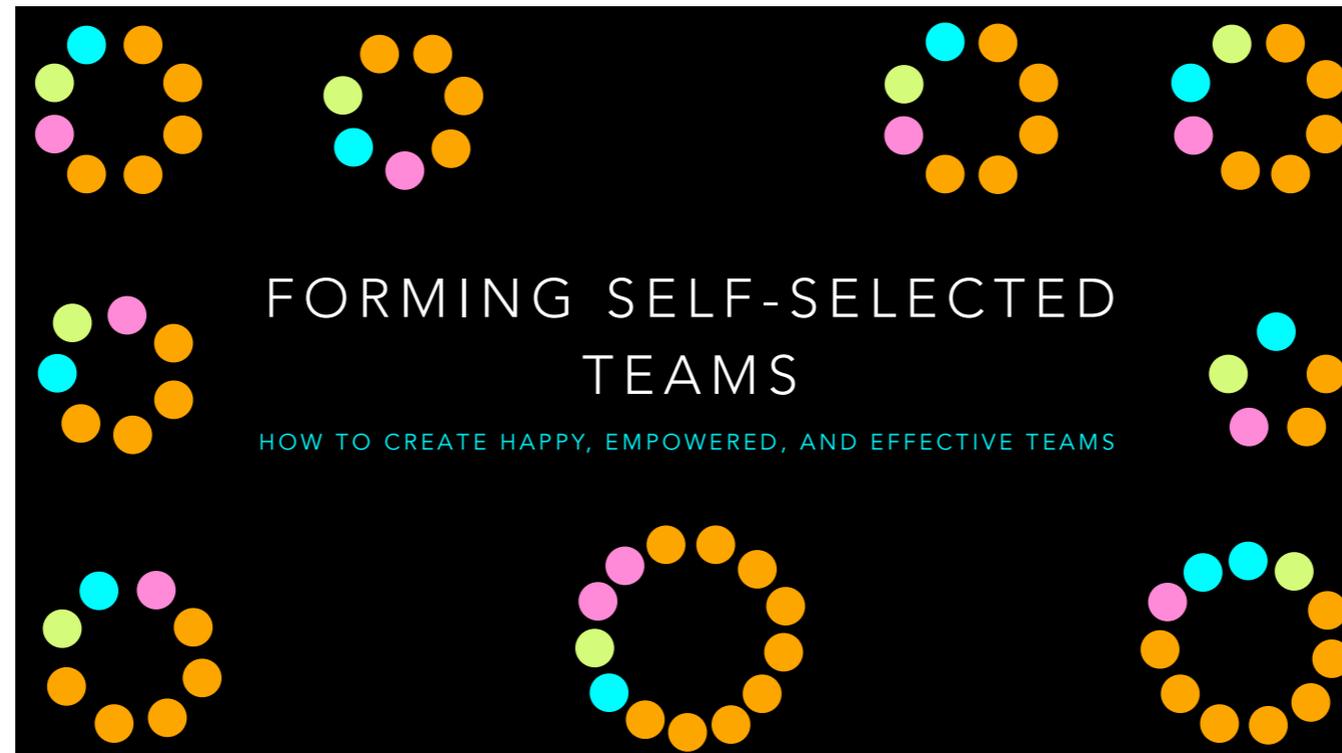


Welcome! I'm going to start off with a simple question: What's the best team you've ever been on? Think back across your career and maybe even before your career started. What made that team so damn good? Maybe it's because that team was high performing, or because you enjoyed the people on it. Maybe this was a team that knew each other's strengths and weaknesses and compensated for each other at the right times. Whatever it was, it felt REALLY good to be on that team, didn't it?



Today, we're going to talk about forming teams through a process called self-selection. This process will enable you to create those awesome teams you remember in a fun, engaging way. In 3 weeks, Opower used this process to form six news teams out of 40 people, allowing them to choose what they worked on and who they worked with. The process even has the right guardrails to ensure that not only are the teams fully formed and balanced, but we still have people doing the work that "no one wants to do". I'm Amber King. I am currently the Head of Product Operations at Capital One Labs and, until recently had been the Head of Opower's Agile Program Management Office. <Jesse introduces himself> Now's the part of the presentation where we make sure the audience is engaged. So I'm going to ask a few questions that I know you're going identify with. So if you all want to get to lunch on time, I expect to see some hands in the air!

**Stale teams?**

How many of your employees haven't switched teams in over a year?

**Retention issues?**

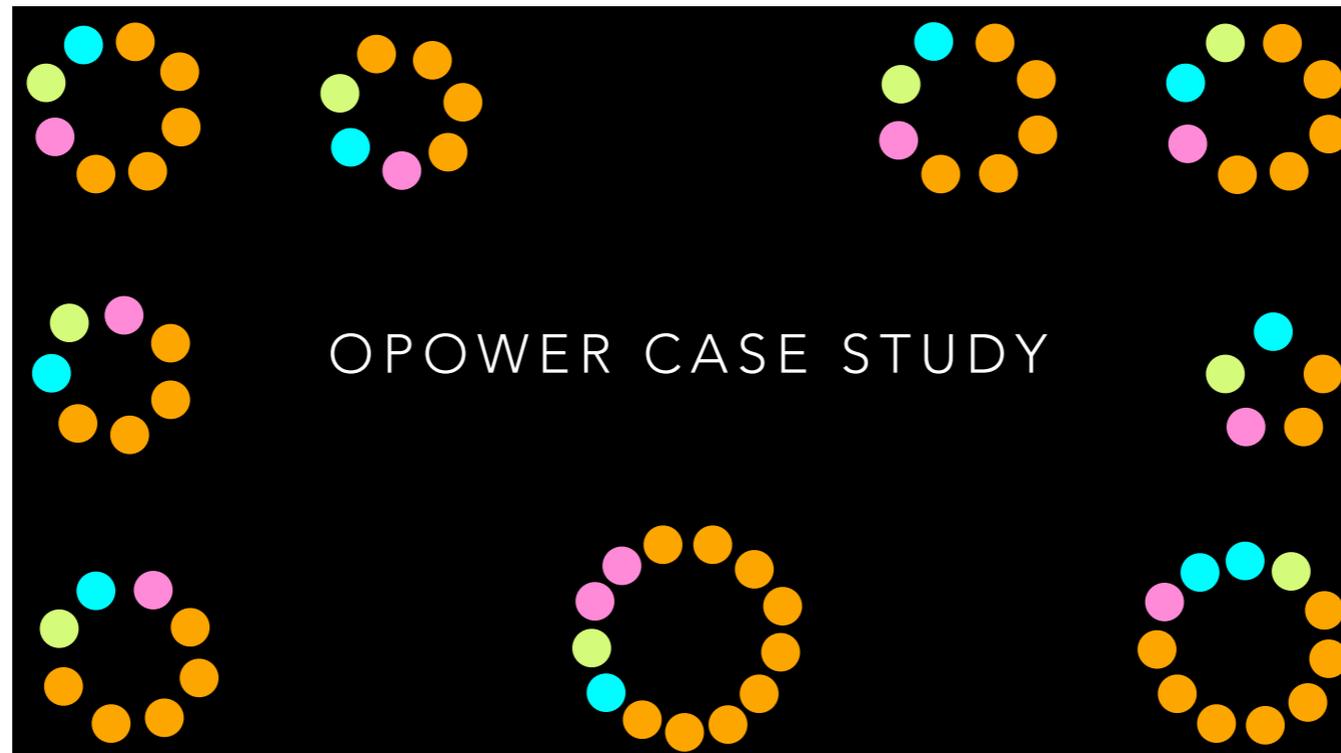
How many of you are dealing with retention issues on your engineering teams?

**Team members who would rather  
be working on other projects?**

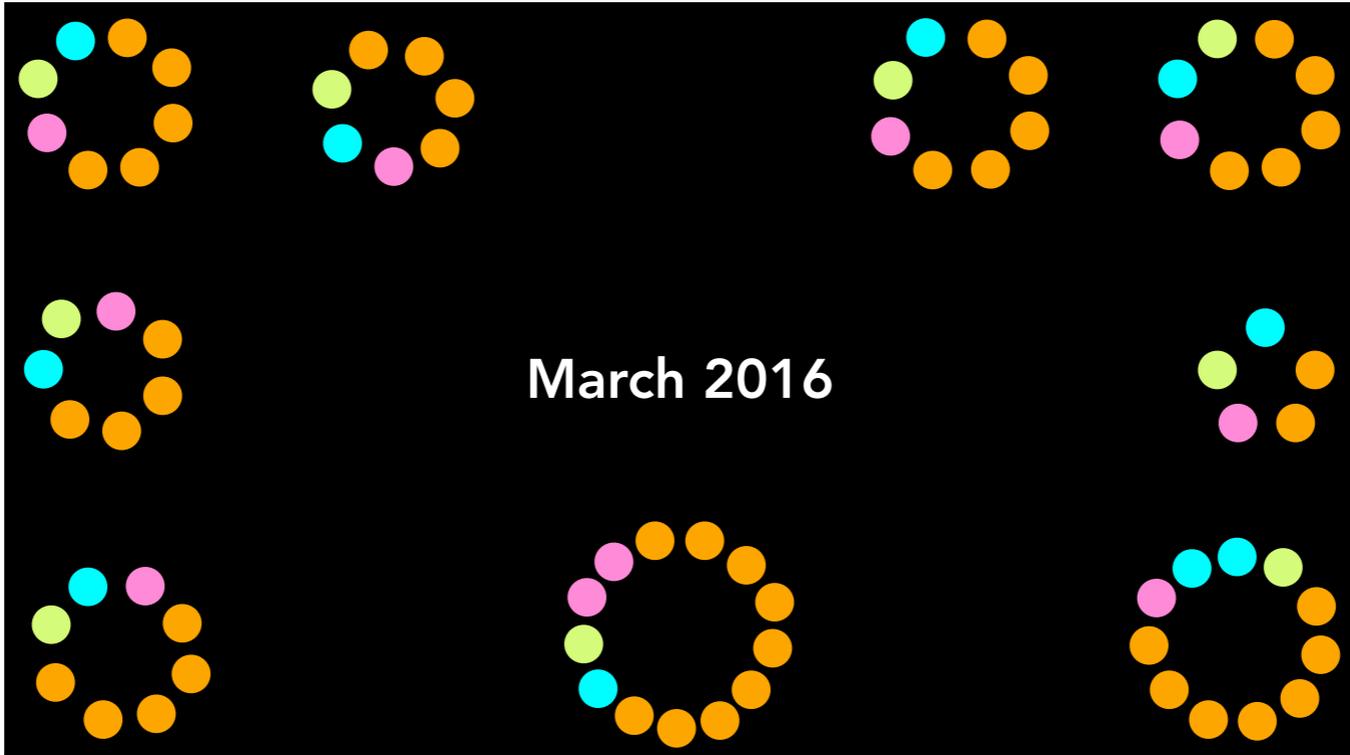
How many of you know of team members who would rather be working on other projects?

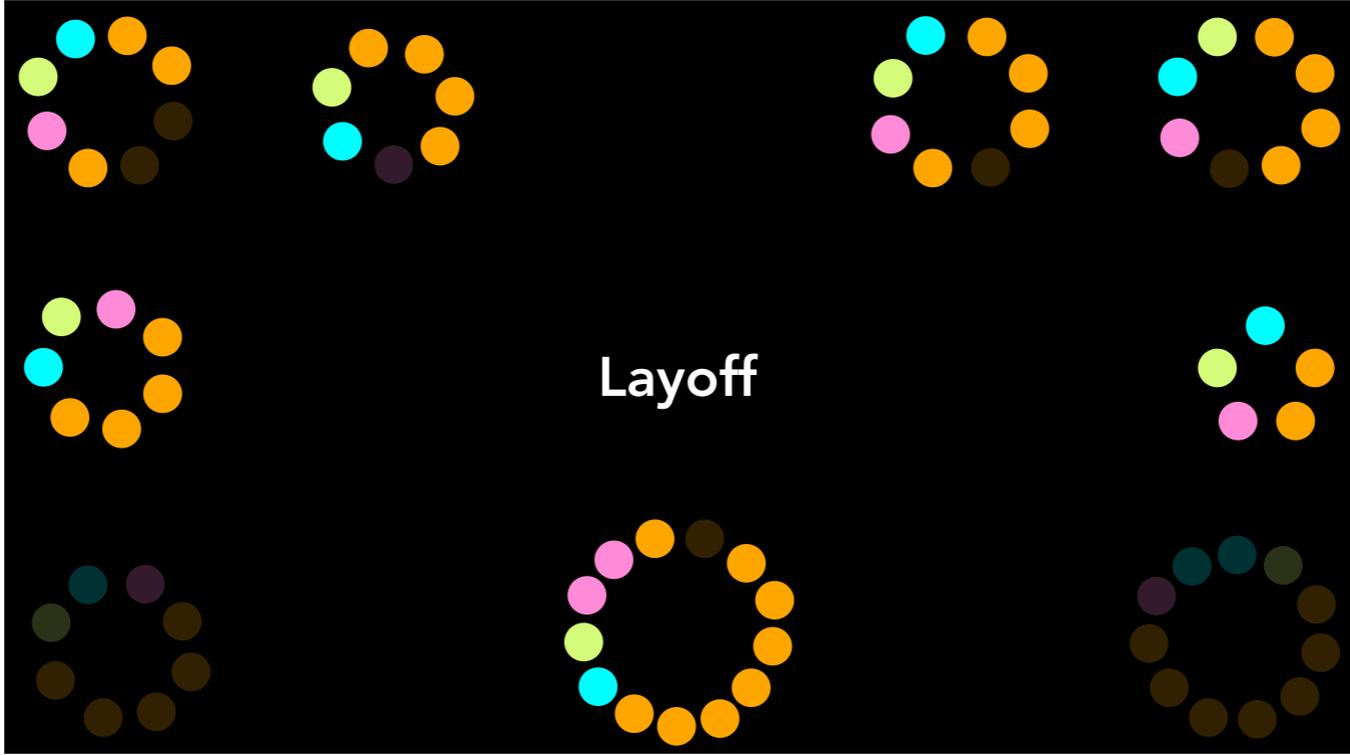
**Want to learn a new skill?**

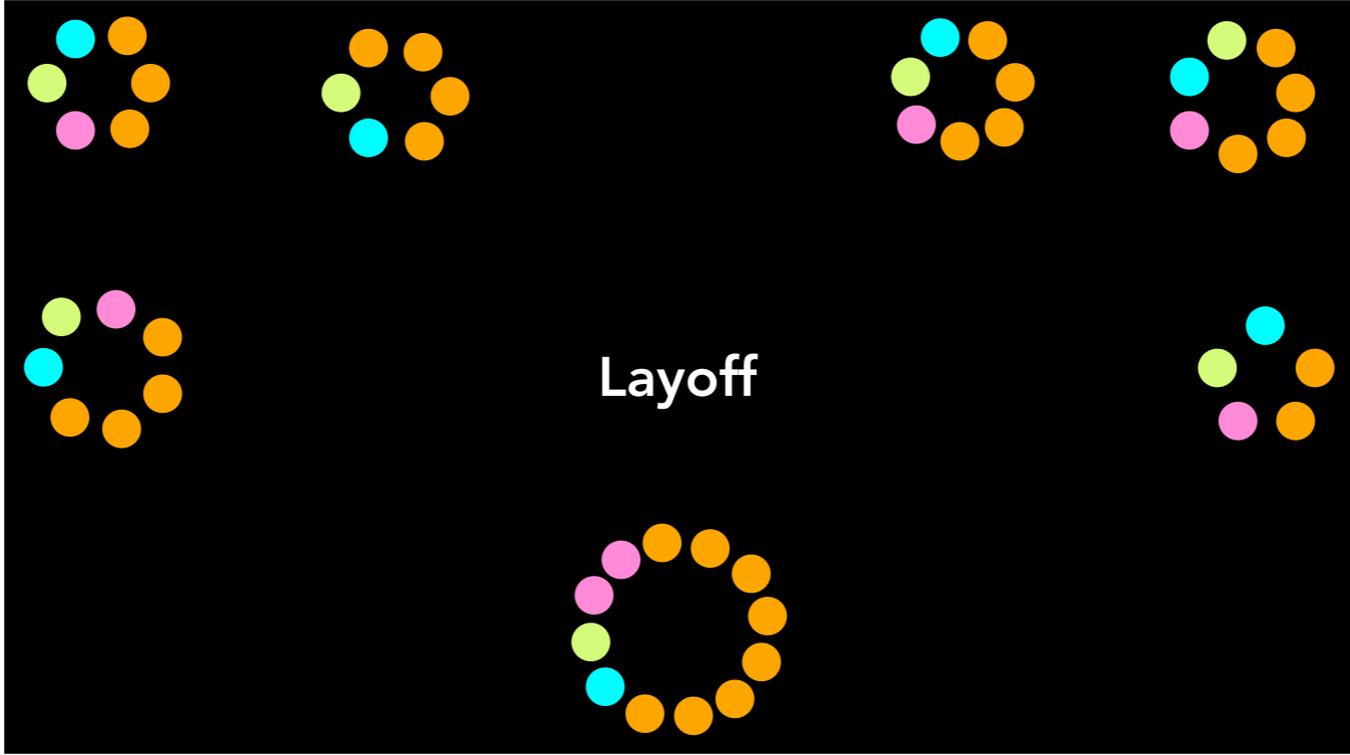
How many of you know team members want to learn a new skill on the job but don't have a great way to facilitate this?

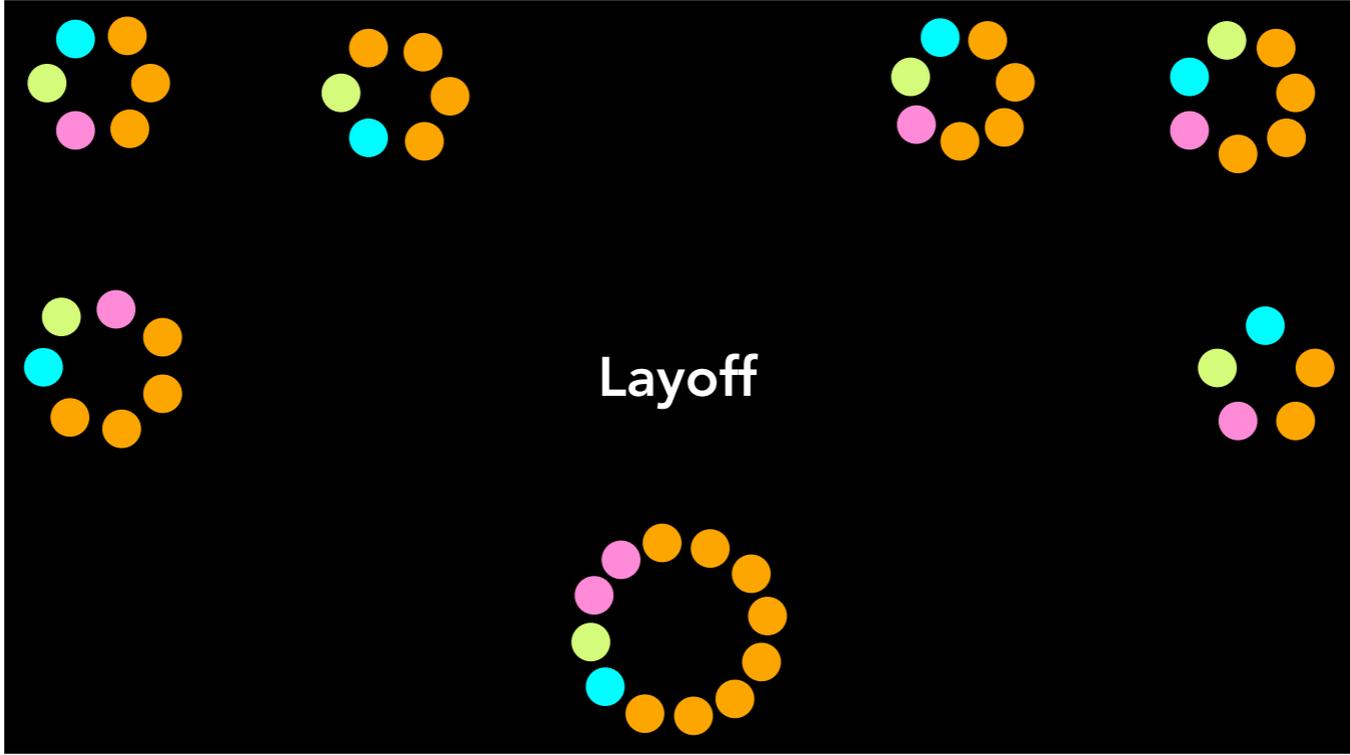


At Opower we were dealing with some of those problems and then some. Lets take a trip back to March 2016...

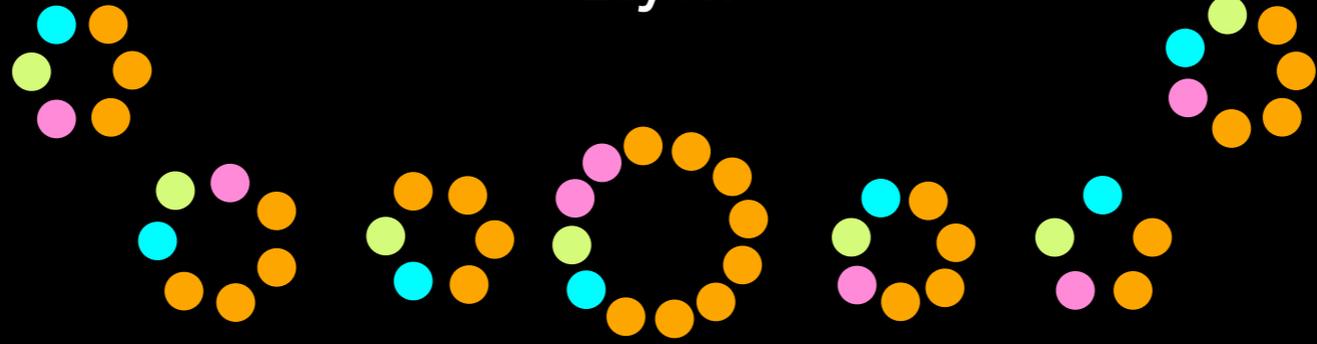








Layoff





We lost some engineers, and some teams moved to other tribes, and we were left with way more products than we could support. So now we needed to figure out how to organize in a way to support our most important business priorities and that's where Sandy Mamoli and David Mole come in... <handoff to amber>



Last summer, at Agile 2015, I met David Mole (shown above with Sandy Mamoli getting their first copies of their books, *Creating Great Teams*). David and Sandy used the Self-selection process to allow 160 engineers at a New Zealand company called TradeMe to choose what they worked on and who they worked with. It worked so well that after six months, no one wanted to switch teams and they'd found that their productivity had skyrocketed.

I immediately thought this process was novel and really embodied the agile ideal of empowerment, but found it difficult at first to get Opower's upper management to try it. Then the layoff happened and we had a perfect impetus to run a pilot.

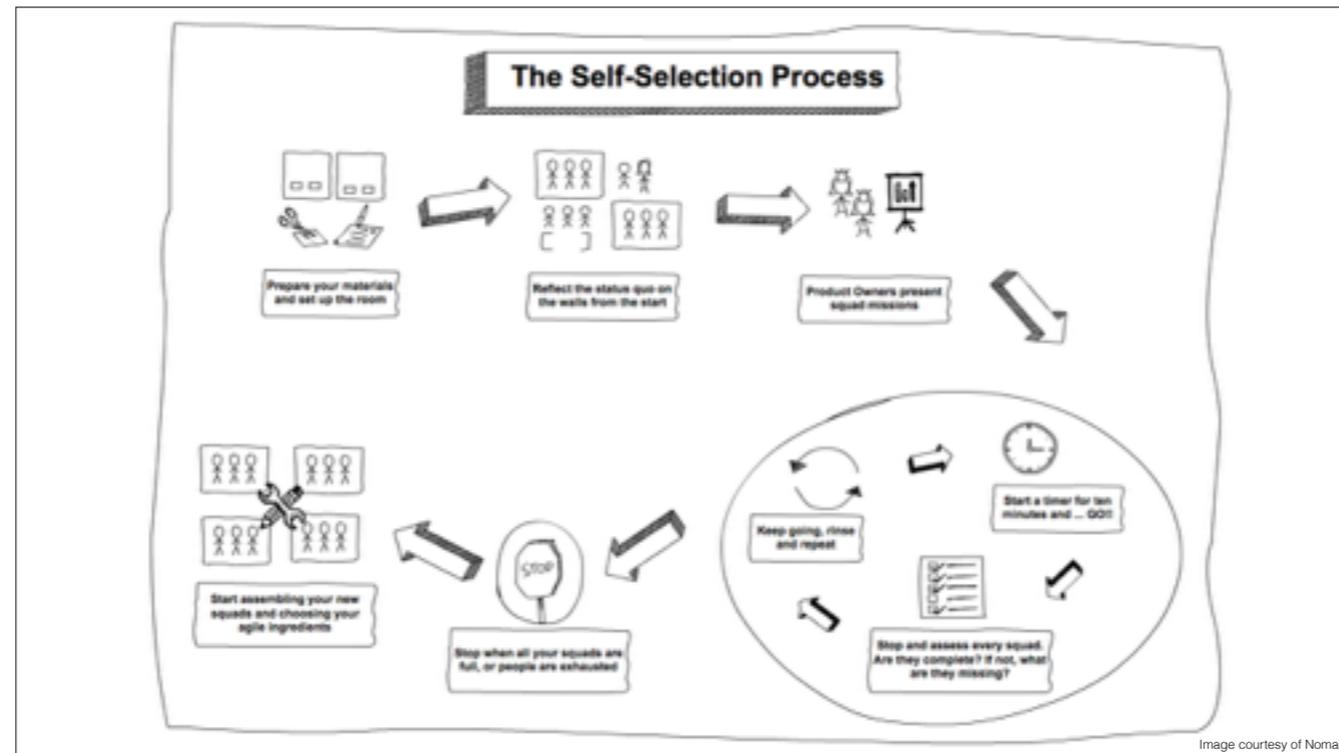
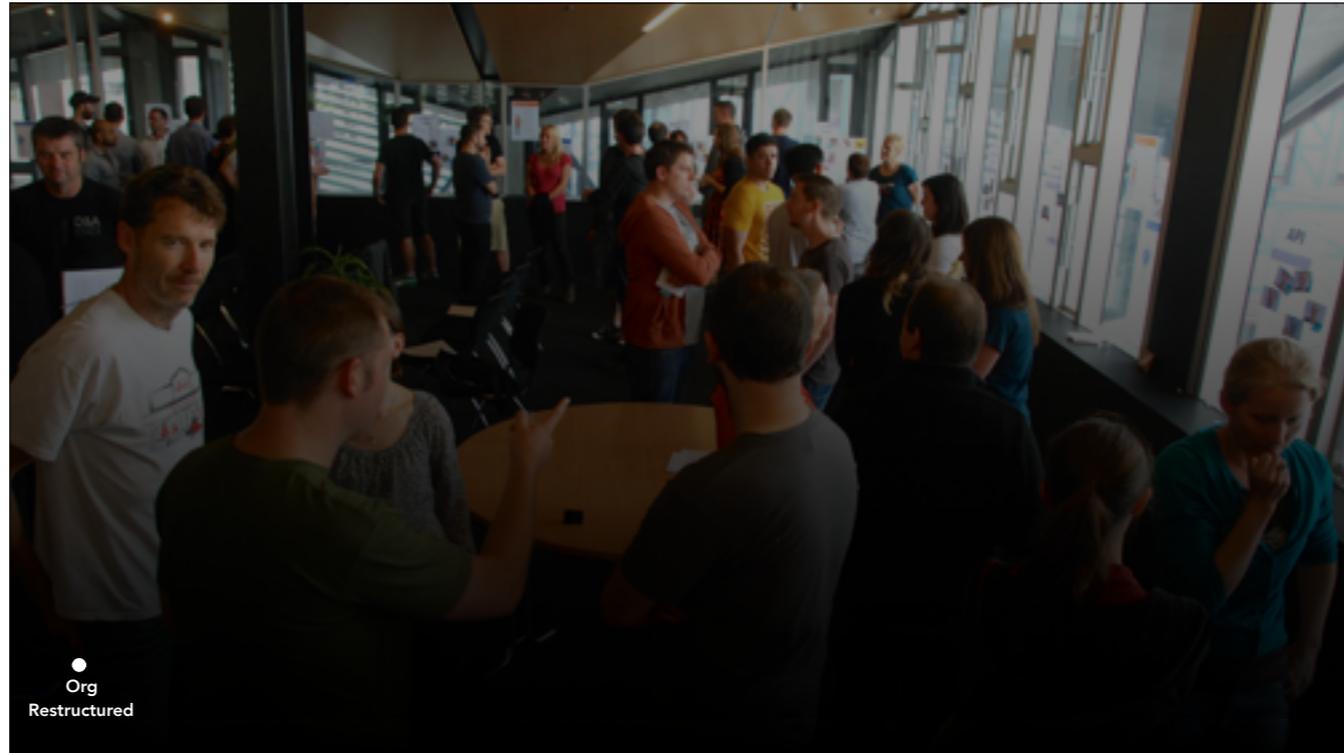
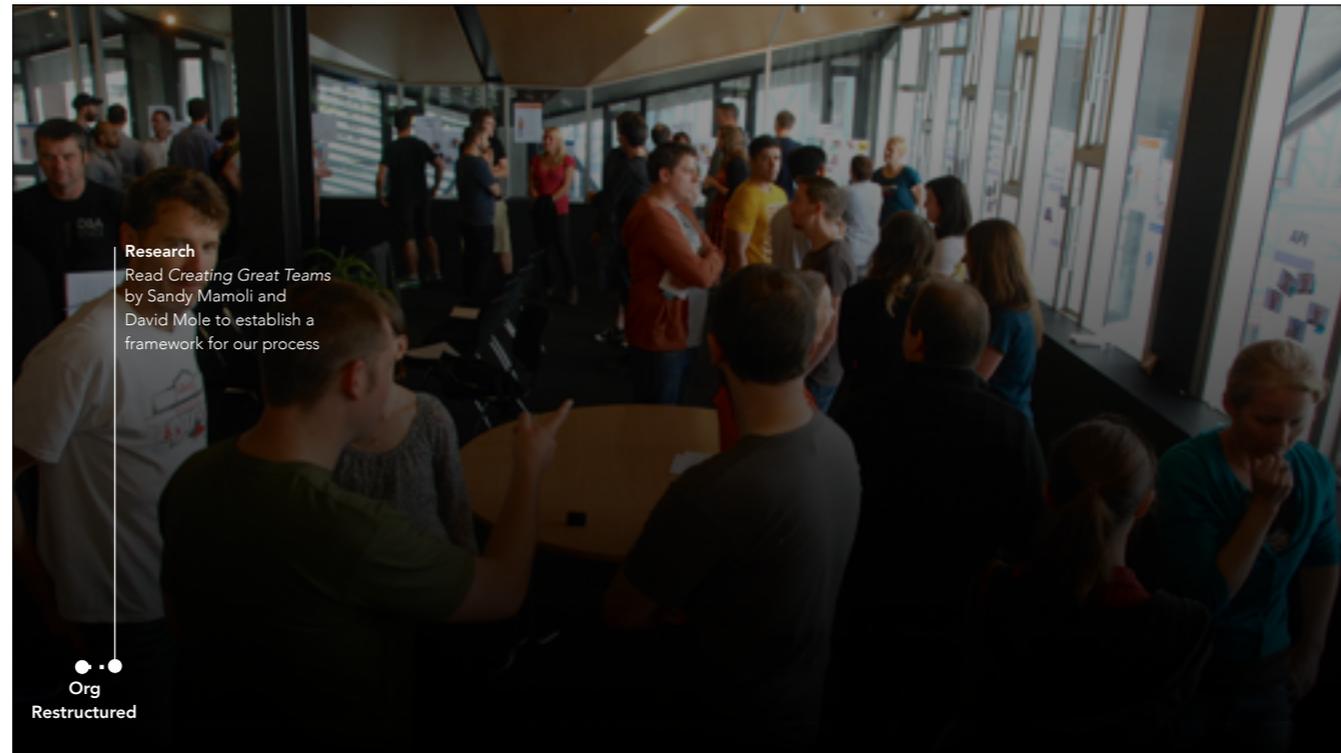


Image courtesy of Nomad8

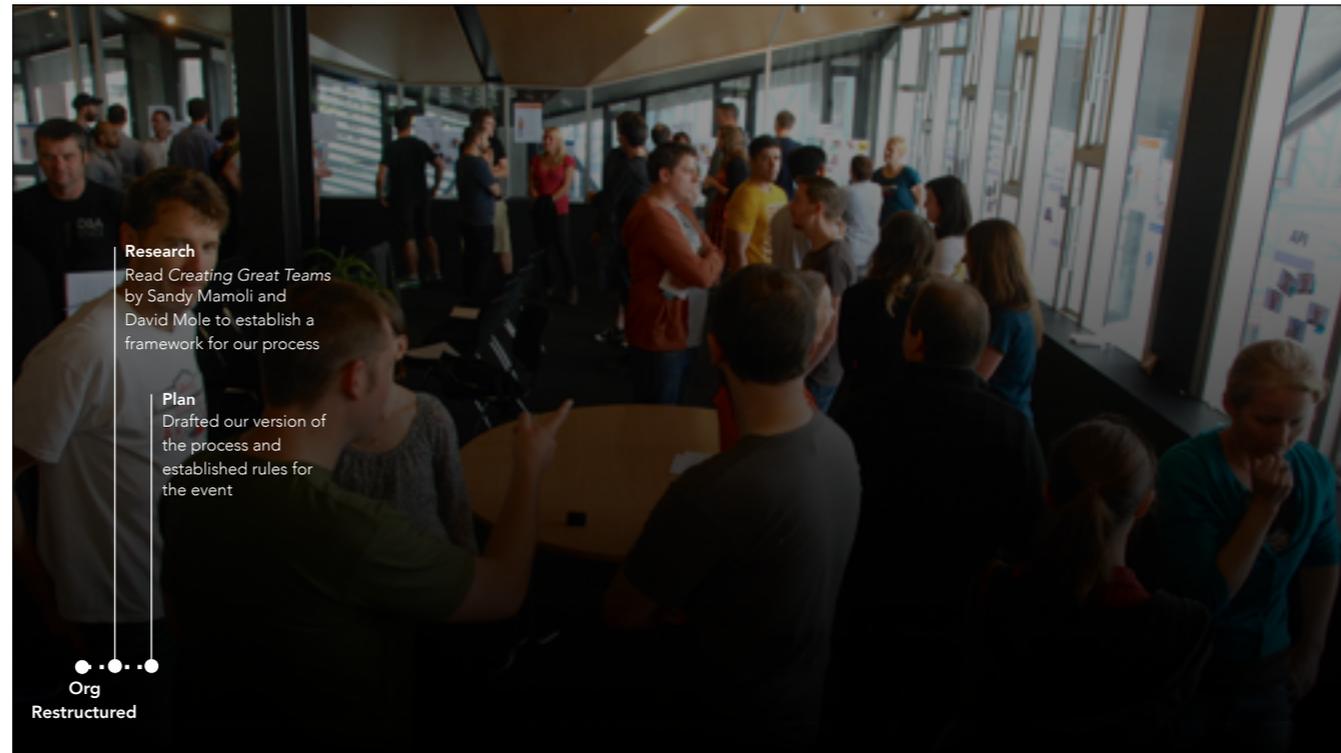
- The self-selection process culminates in a self-selection event.
- Iterative event that allows several rounds where teams will physically pick the teams they want to be part of.
- Start with the list of teams/projects
- First 10 minutes pick teams
- Point out gaps
- Continue
- Rules are what make this work
- I'm sure you have questions, but we'll be going into much greater depth in the coming slides, so hold those and we'll leave lots of time at the end



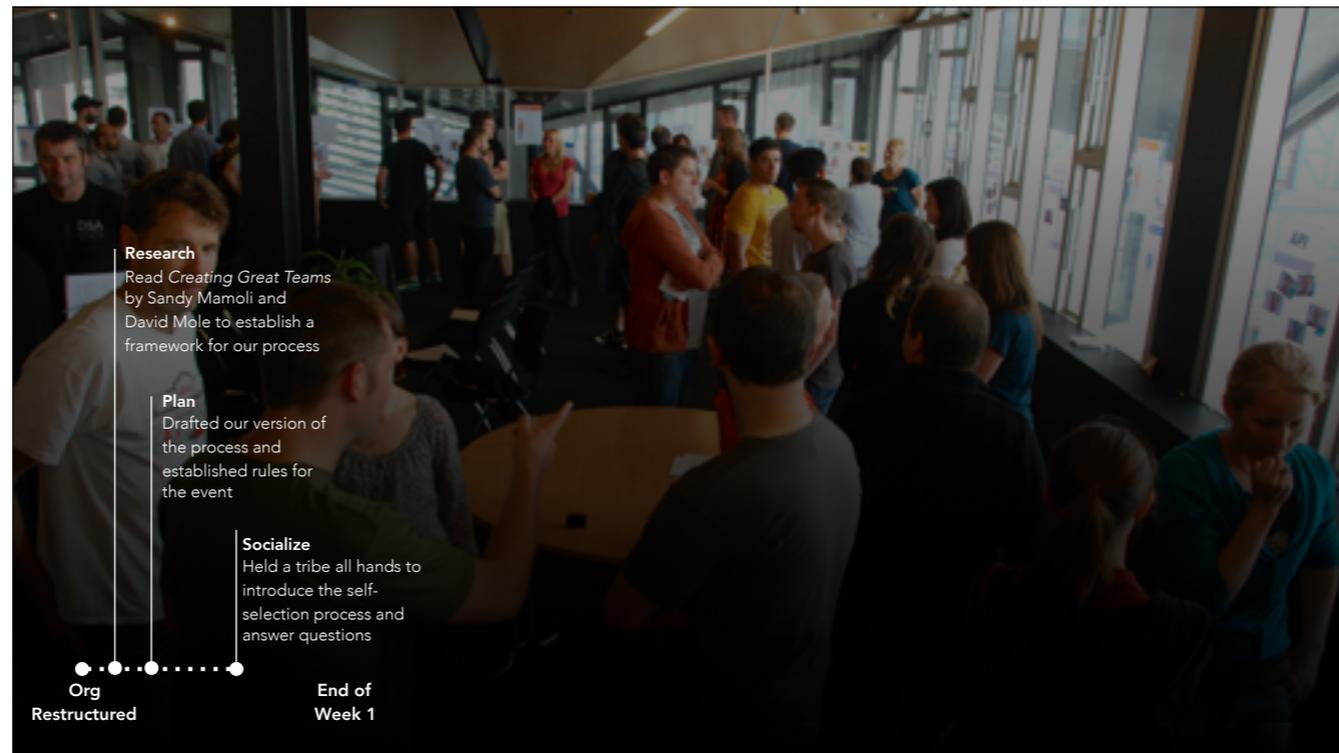
So, how do you prepare for such an event? The whole process takes between 3-6 weeks and I'll use the timeline that Opower used (3 weeks!) as a backdrop to describe the preparations.



First, start with Research! I highly recommend you read David Mole and Sandy Mamoli's *Creating Great Teams*. It is filled with practical details from their self-selection events. We have placed links to other resources at the end of this deck too. Also, come talk to Jesse and I, we love helping other organizations try this out.



Next, start planning. I recommend you start from the end - pick a date that you'll either want to run the self-selection event or have your new teams start and work backward from there. You'll need plenty of time to announce the process, talk to everyone 1:1, plan what the teams will be working on, establish rules, and create the materials.



Announce self-selection! Announce it to everyone all at once and save plenty of time for people to ask questions about the process. People are initially very skeptical about a few major things:

1. What about the work that no one wants to do, but HAS to get done? - “Do what’s best for the company”
2. What if someone is “last picked for the kickball team”? - Never happens, we’re all adults
3. What if I make a mistake - am I stuck on this team forever? - Re-evaluate in 3-6 months - no one has wanted to switch teams yet

After the meeting, you’ll get a million 1:1 questions/fears. Some of them are legitimate issues that should be worked through (what about project x - only one person has these skills). Make sure you work through those.

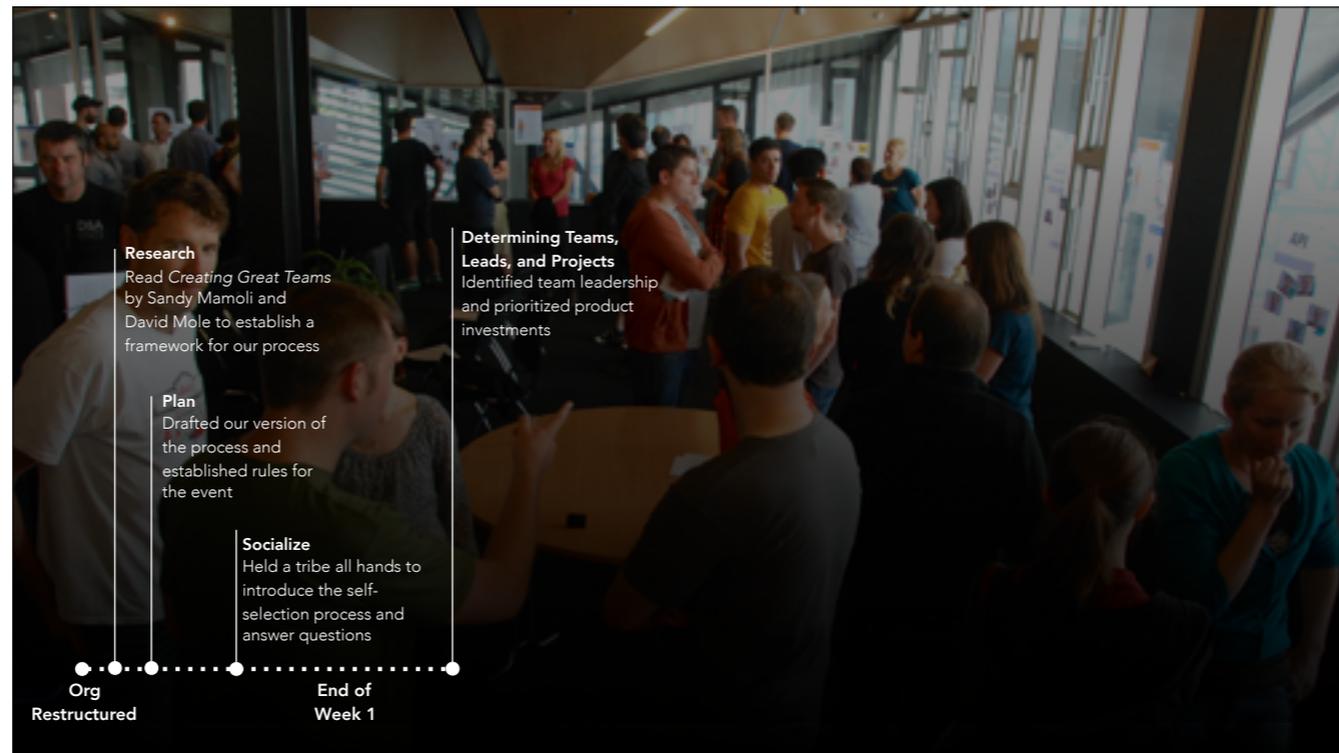
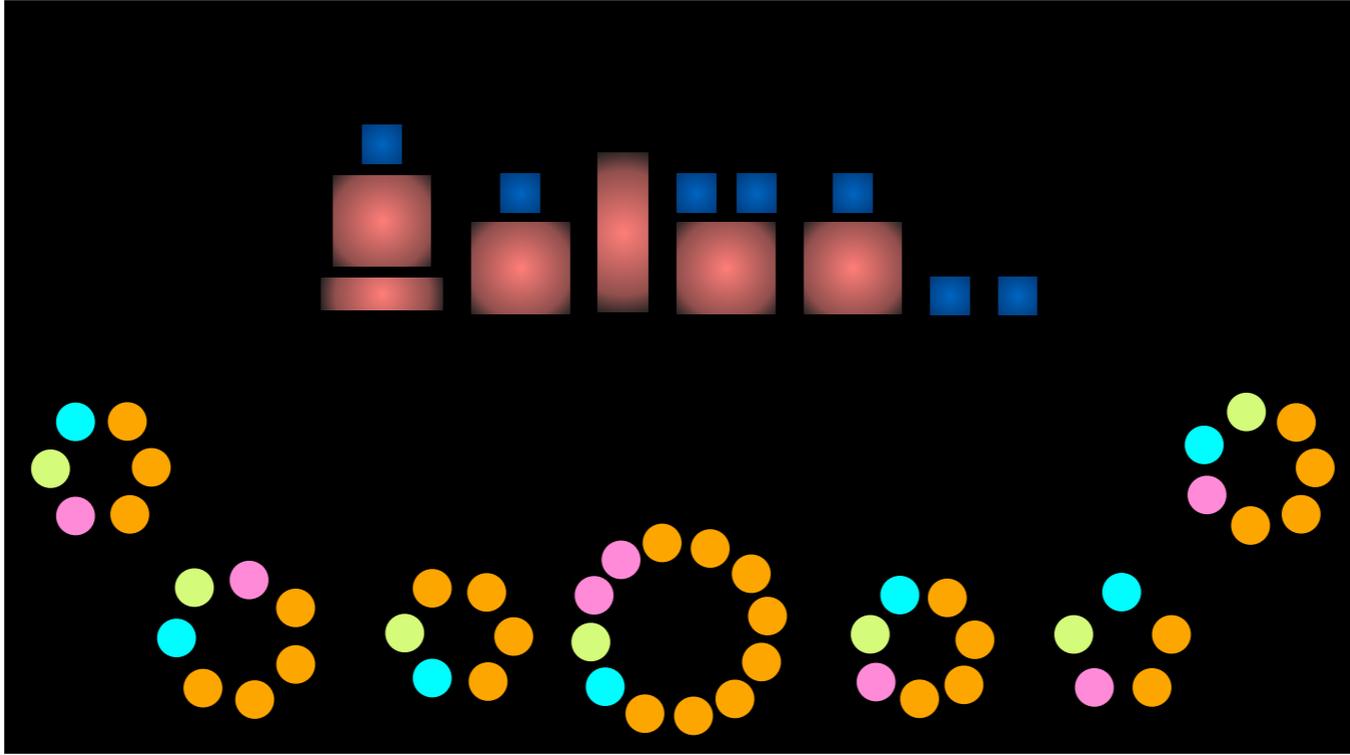
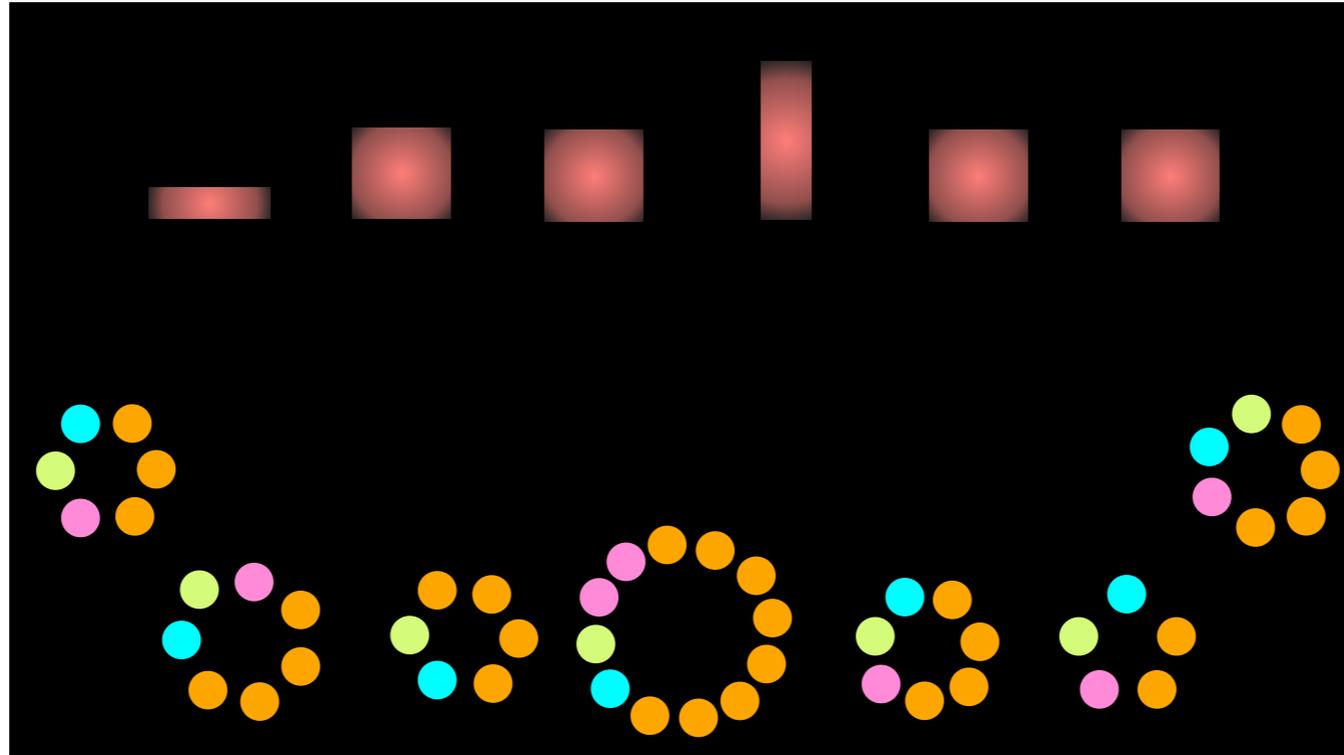


Figure out how many teams you will have and who will lead them. [JESSE] At a bare minimum, know who the PM will be for each team. oPower knew who the PM and EM would be. Figure out what projects that team will work on for the next ~6 months (visit your backlog), and what skills it will need. Document them on a “team sheet” that will be posted during the event.

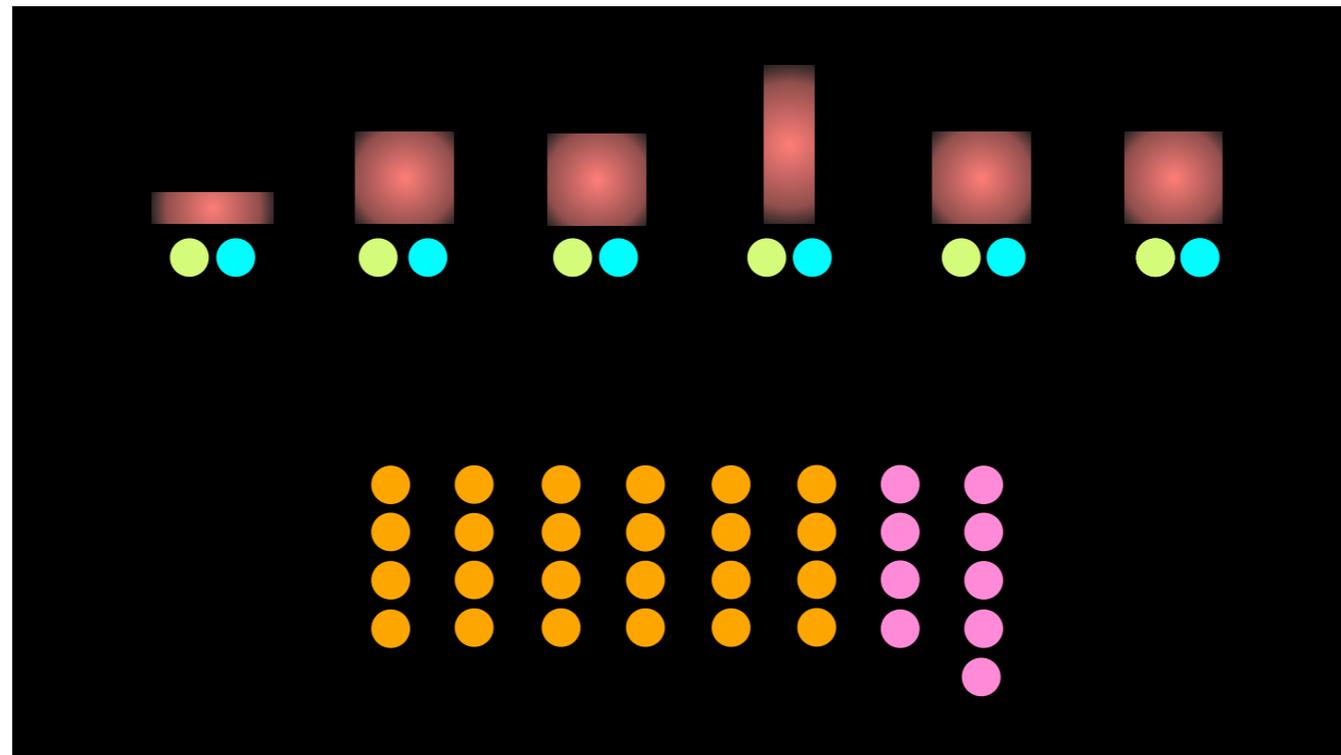


So here we were with fewer teams and way too many products and components so we started by identifying 6 themes or business objectives to orient the teams around...

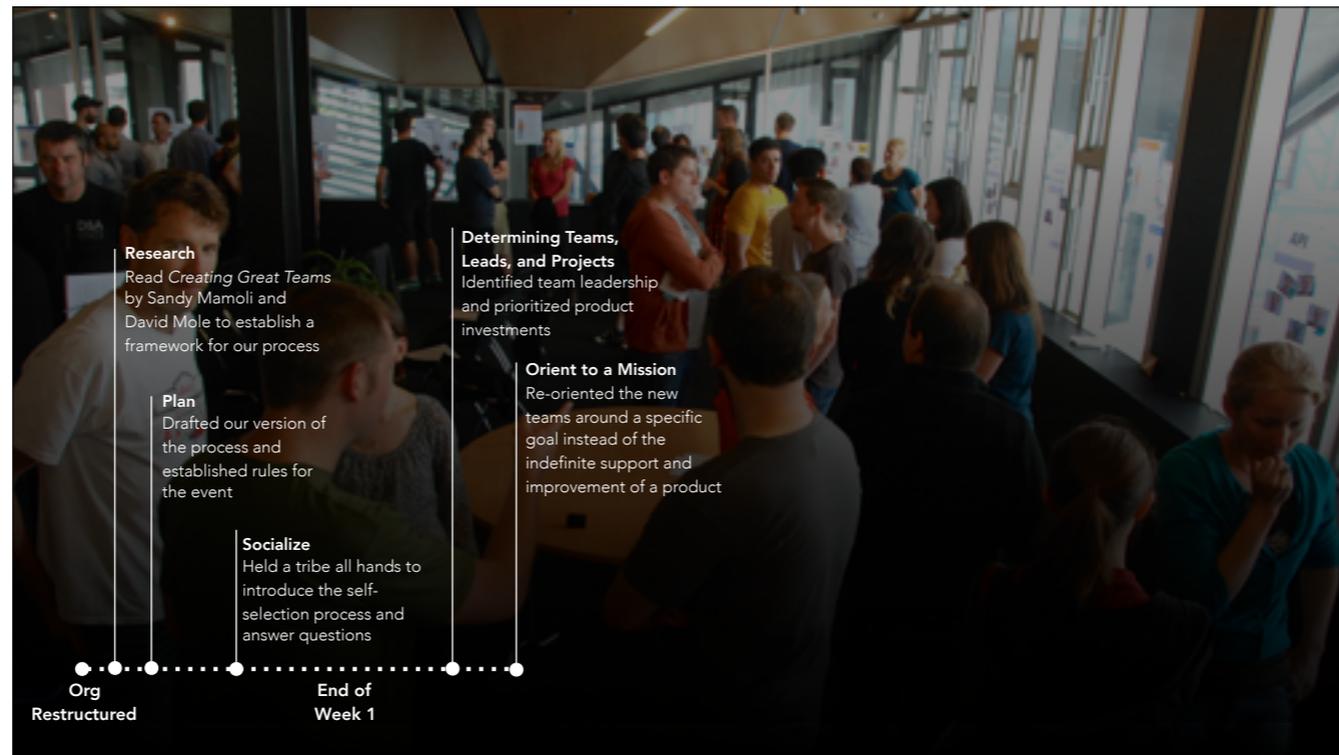




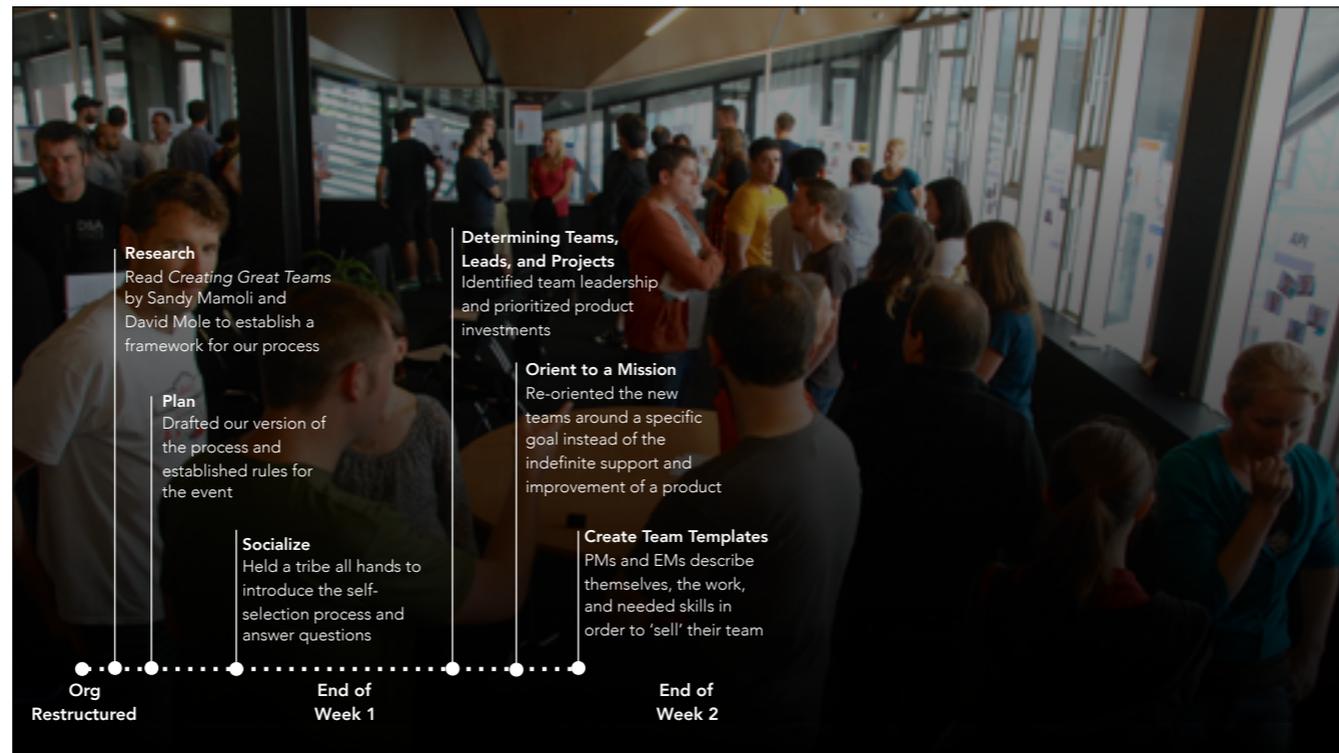
Once we did that we identified the Product Managers and Engineering Managers that would lead those teams



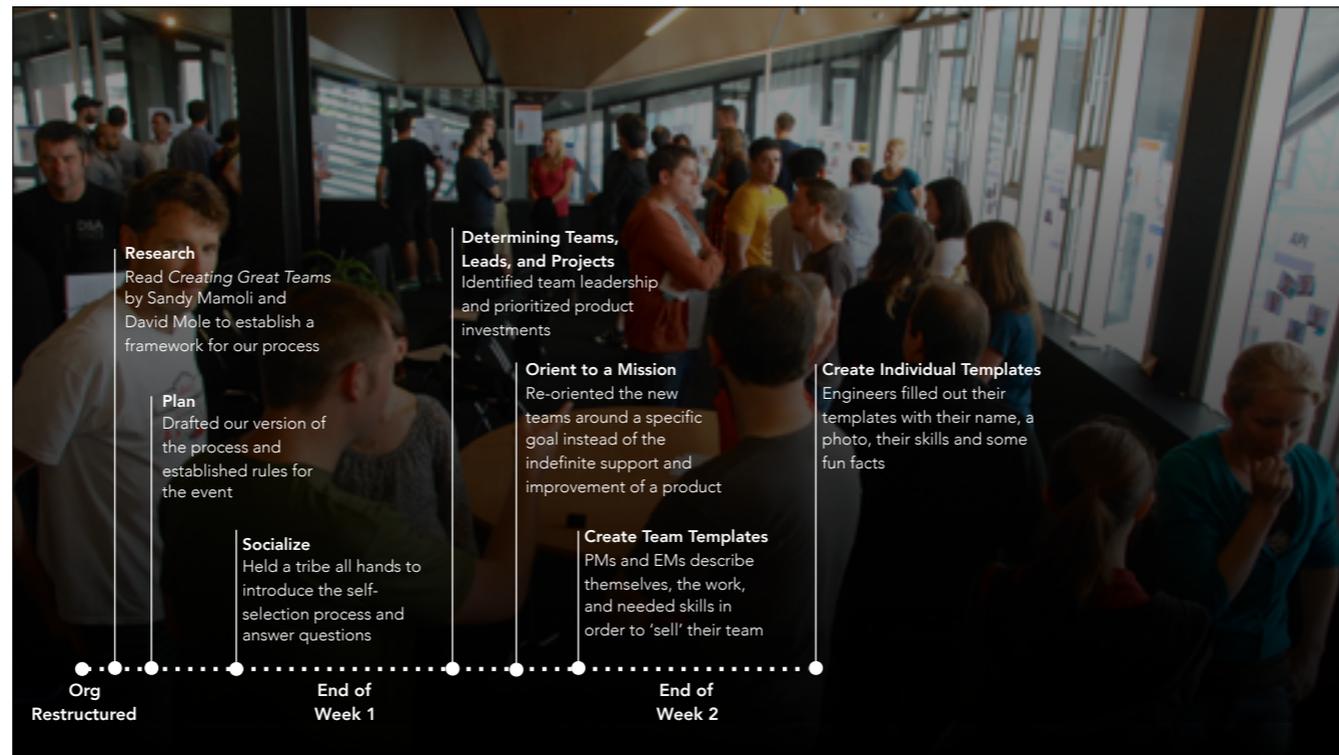
Everyone's situation is different but we recommend that you at least have a Product Manager/Owner identified for each team/squad



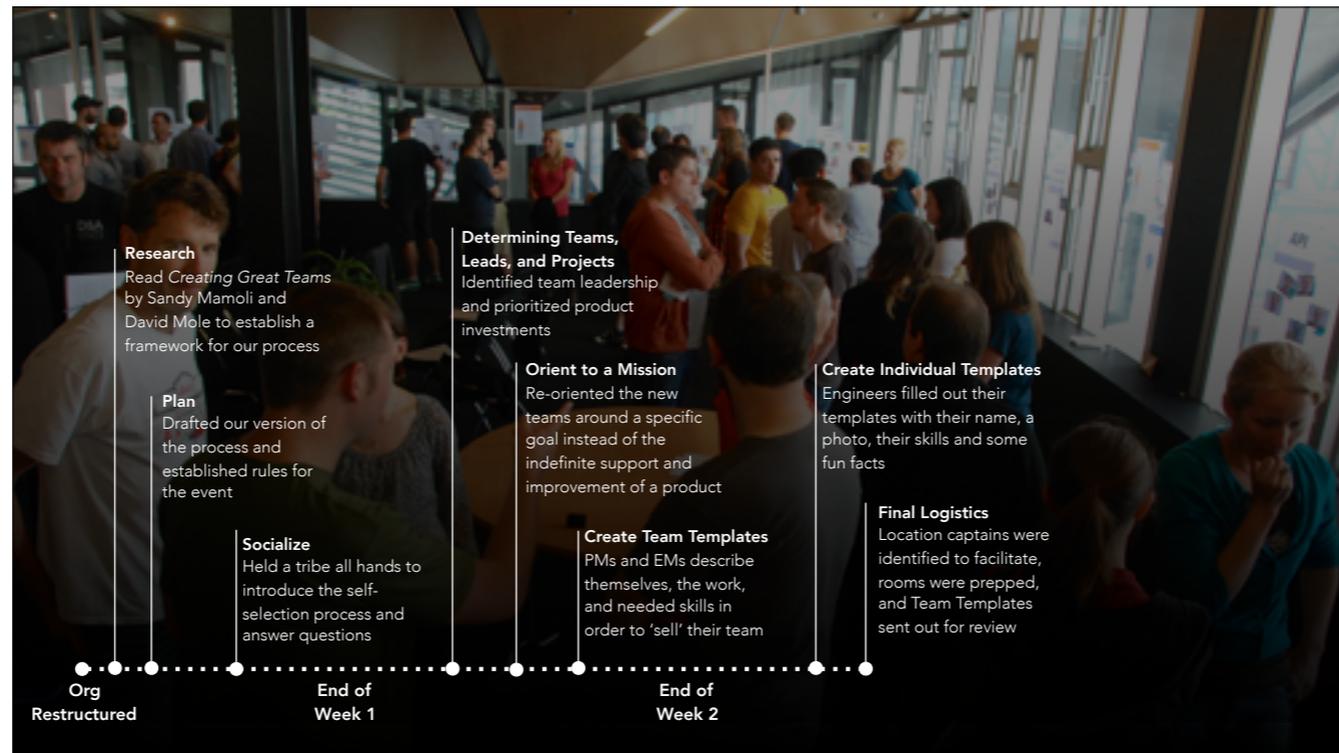
Orient around a mission. Either remind people what makes the organization great or get a new mission that is easy to rally around. Our energy efficiency mission was still valid in this case.



Make sure you're ready for the event and have the team information documented. Don't share this with the teams yet. Politics.



Have each engineer/team member create a sheet about themselves. This is option, you can just use pictures, but we found that it's more fun to have team members walk into the room with their name, photos and a few fun facts or skills listed for everyone to read.

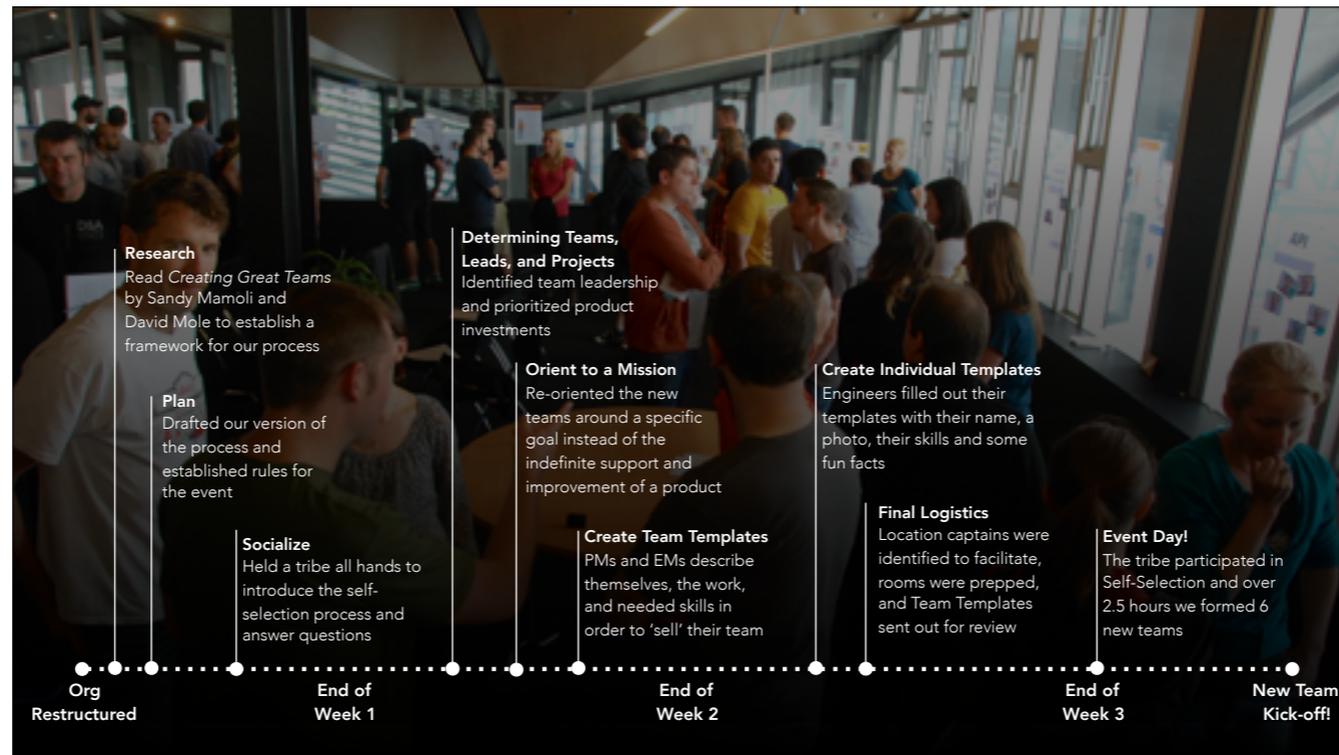


At this point you're getting really, really close to the event and you're almost ready. It's time for final preparations:

- Find location captains and train them - one person per location - they set-up the room, digitize choices for everyone to see and help moderate stalemates
- Ensure your team and team member sheets are printed and ready to go
- Have rooms and food ready
- Have some rules!

Rules make the event work. Sample rules:

- Mandatory: Do what's best for <your company name>
- Optional: Team size
- Optional: Roles present
- Optional: Co-located, etc



It's time for the event! in 2.5 hours, we fully formed 6 teams! Here's how:

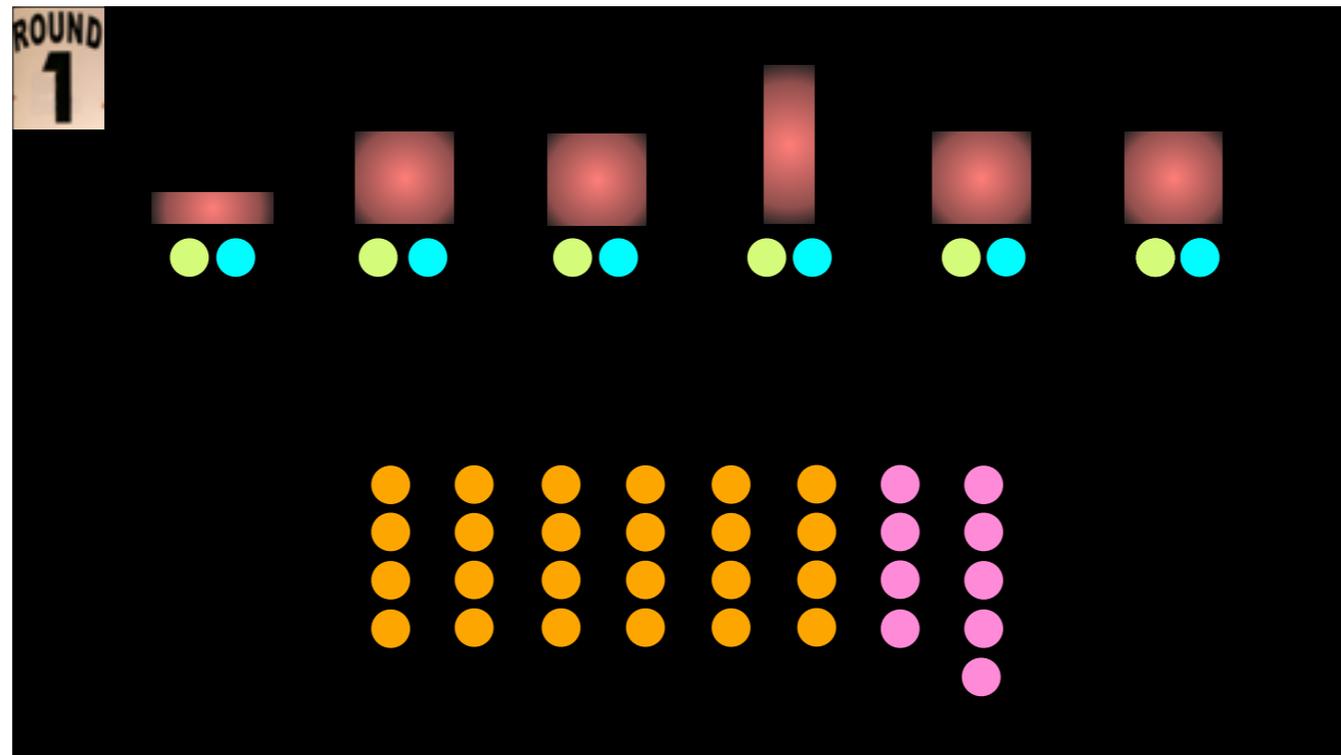
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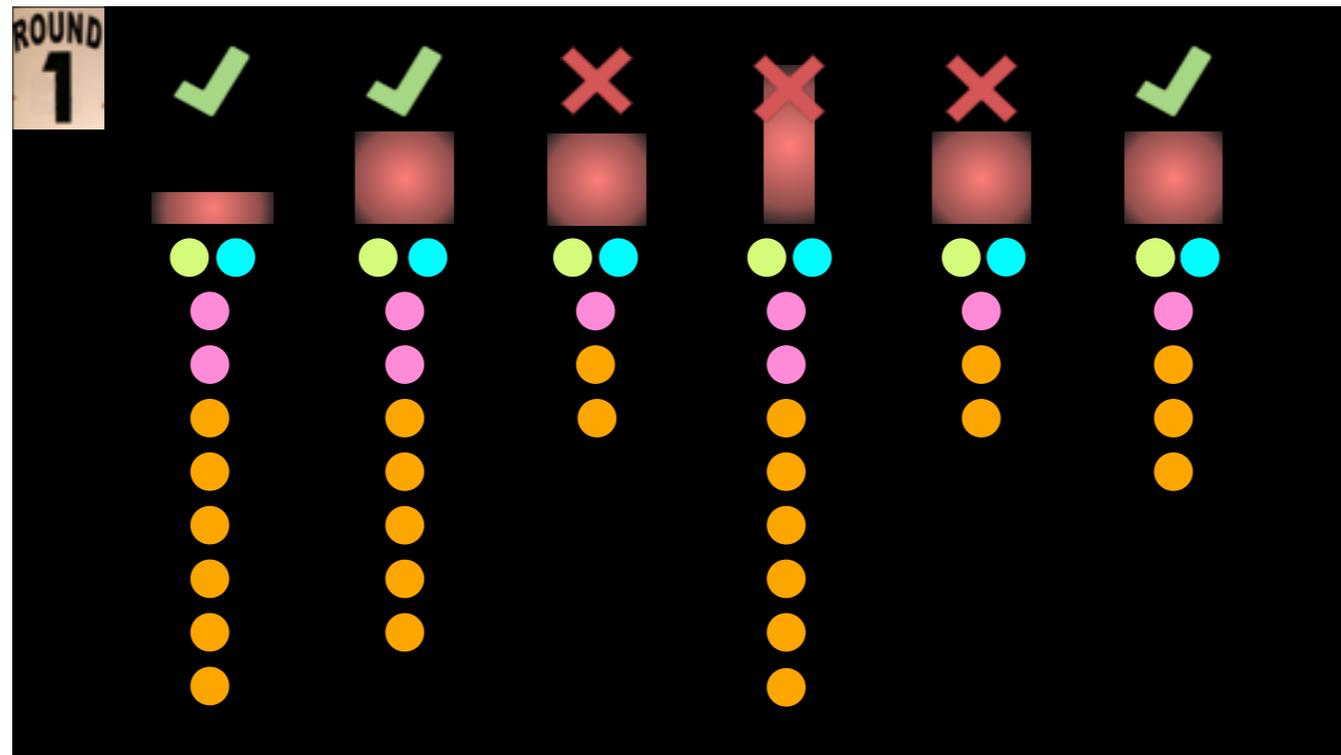
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**GO!**

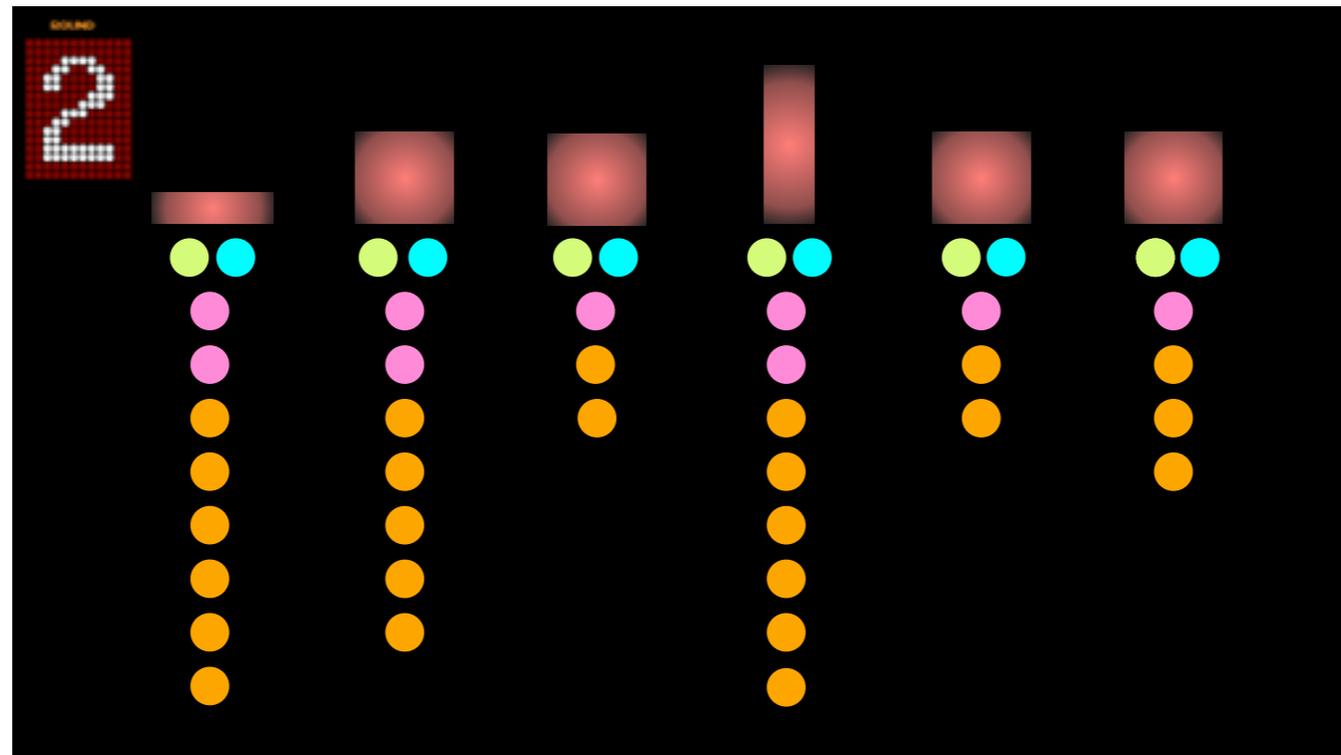
The rooms are set up, the location captains are ready, introductions have been made so there's only one thing left to do....



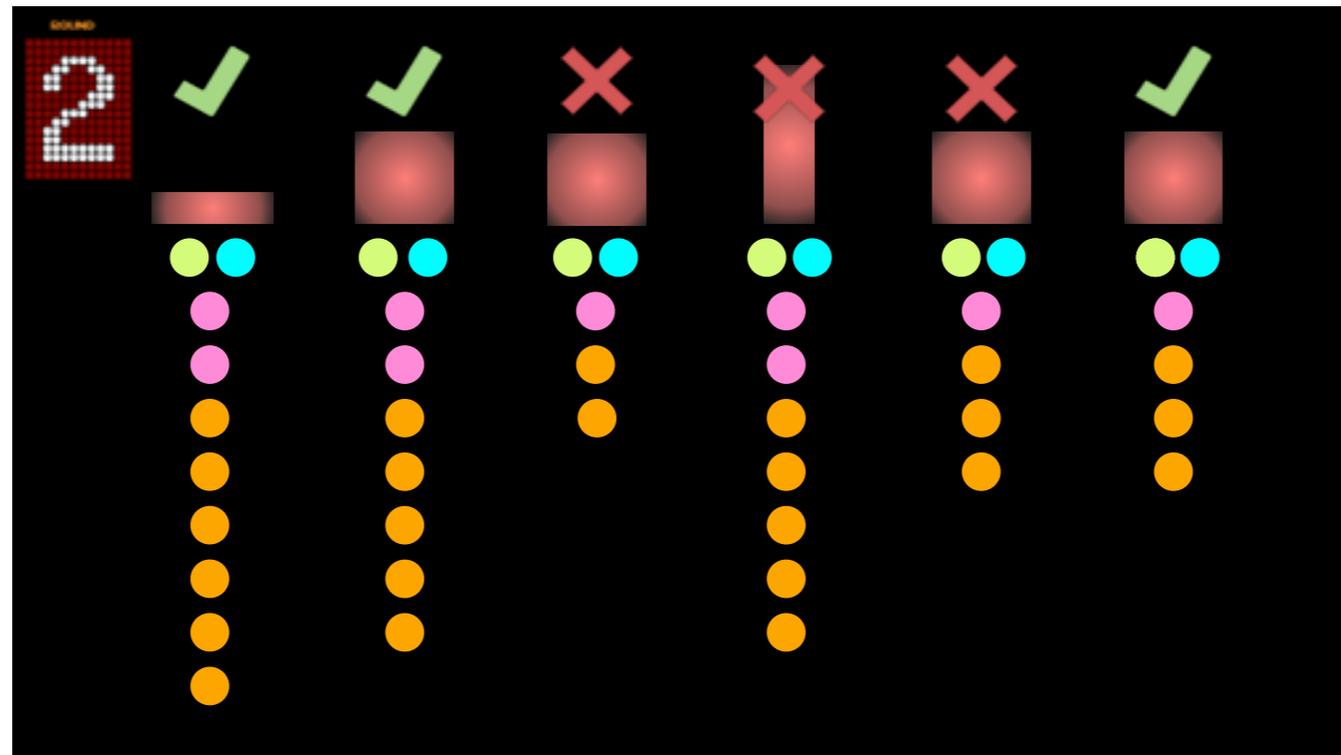
At this point you set a timer for ten minutes and tell everyone to get up and pick their team. And they do...



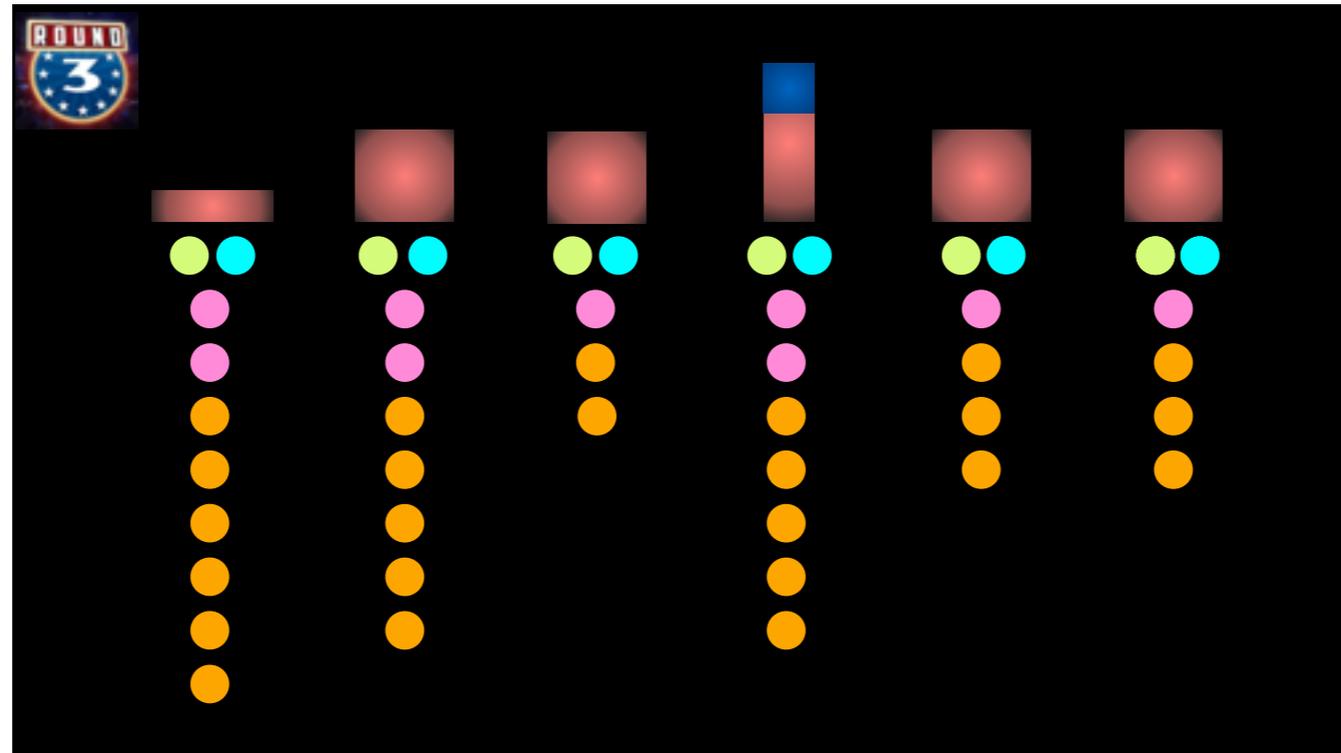
At the end of each round we ask the product and engineering managers if they have enough people to complete the work as well as the right mix of skills. At the end of round 1 we had 3 fully formed teams and 3 teams that were either too big or too small.



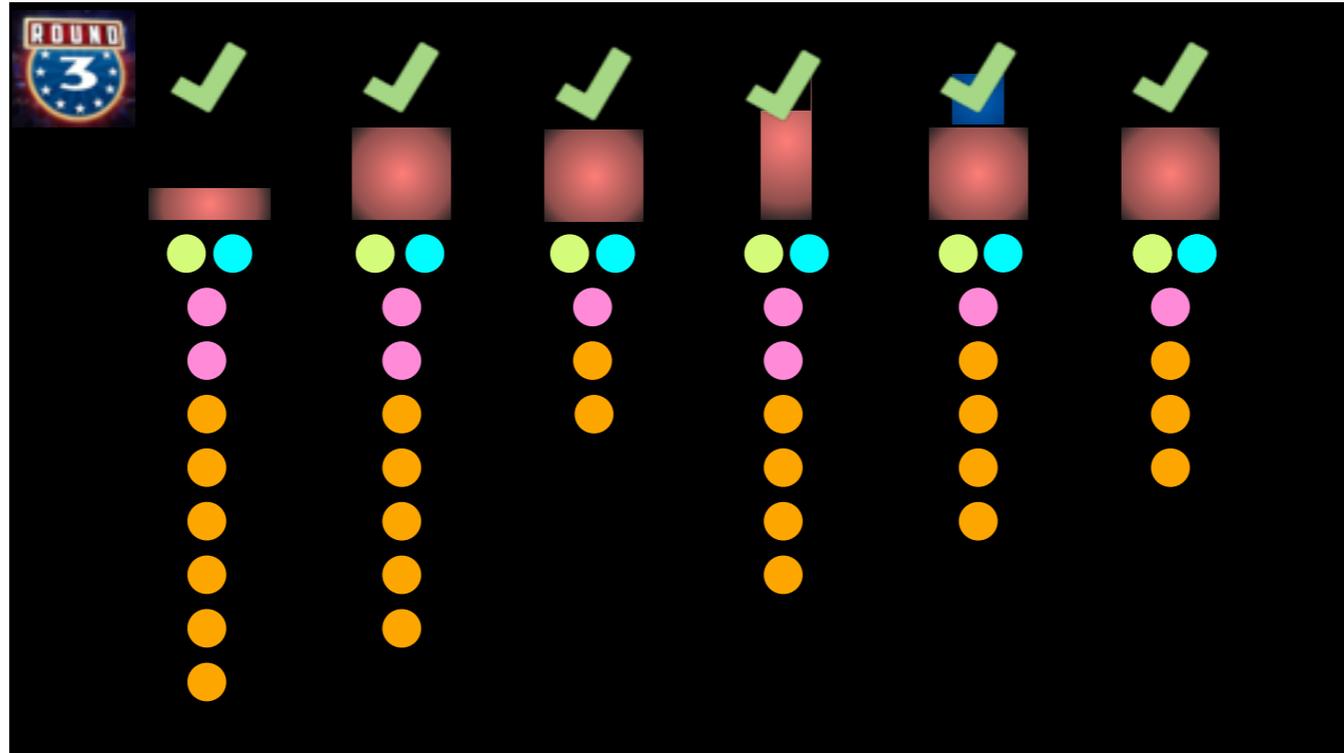
Once the EMs and PMs have weighed in on the “completeness” of their teams you immediately put 10 minutes on the timer for round 2 and tell people to get up and move again. People may like where they’re at or be hesitant to move so you may have to really force them to get up and sort things out.



We had one person move in round 2 but still had 3 teams that were not complete so we put another ten minutes on the timer and started round three...



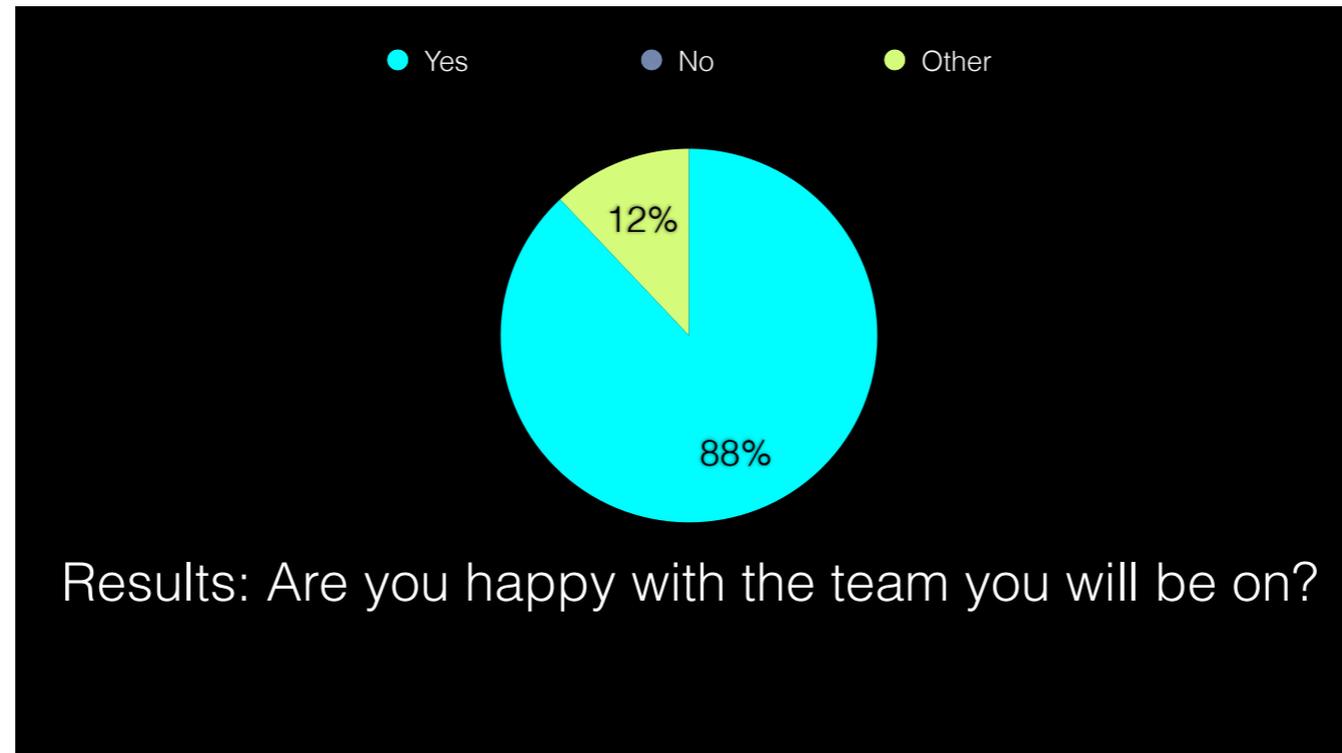
At this point we realized that we had a stalemate, which is very common in self selection events. To help break the stalemate we had the engineers on the team that was still too large share their reasons for wanting to be on that team. And in listening to them we realized that there was an opportunity to solve the issue by moving our Monitoring Dashboard work to one of the other teams and one of the engineers would go with it.



And just like that, all 6 teams were complete!

RESULTS &  
LESSONS LEARNED

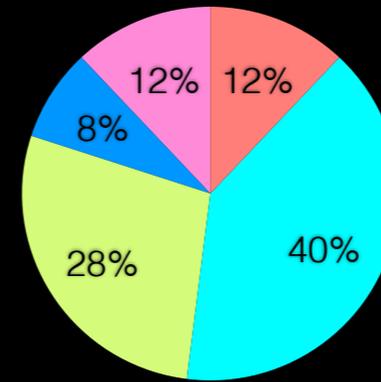




We wanted to know what people thought of the process, so we asked key questions about that and about how happy they were with the teams they ended up on.

Surprise! No one was unhappy!! (The 12% here are the people who didn't have a chance to choose teams, like the PMs and Ems)

- 12% ● Type of Work
- 40% ● Doing What Was Best for the Company
- 28% ● People you did want to work with
- 8% ● Skills Growth
- 12% ● Other
- 0% ● Product Owner
- 0% ● People you did NOT want to work with



Results: What primarily drove your self-selection choices?

This is an interesting chart! We suspected that most people who be picking teams based on the work or the people they want to work with. In fact, relationships took a back seat to what was best for the company!! Followed by relationships, then type of work and skills gain.

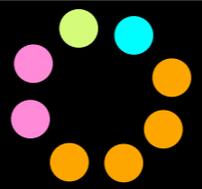
“Looking at the outcome of the process, it is difficult to argue against. Each team appears well-suited to meet its short term needs and the teams are reasonably well-distributed. If we had done this through another process 100 times, I believe that most of the outcomes would not have been as good as this one.”

*–Josh Essex*

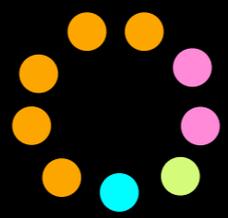
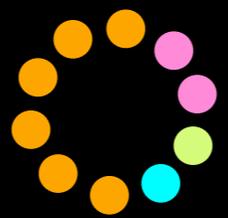
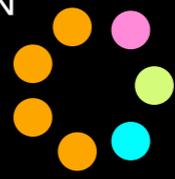
This quote sums up what many of us thought about the process. This came from one of the more outspoken tech leads who participated in the event.

# Lessons Learned

- Set expectations
- Don't share team information ahead of the event
- Have moderators
- Developers love full stack!
- Keep spectators (including directors!) out
- Hold the event in person (when possible)



HOW TO RUN A SELF-SELECTION  
EVENT YOURSELF



# Research & Support

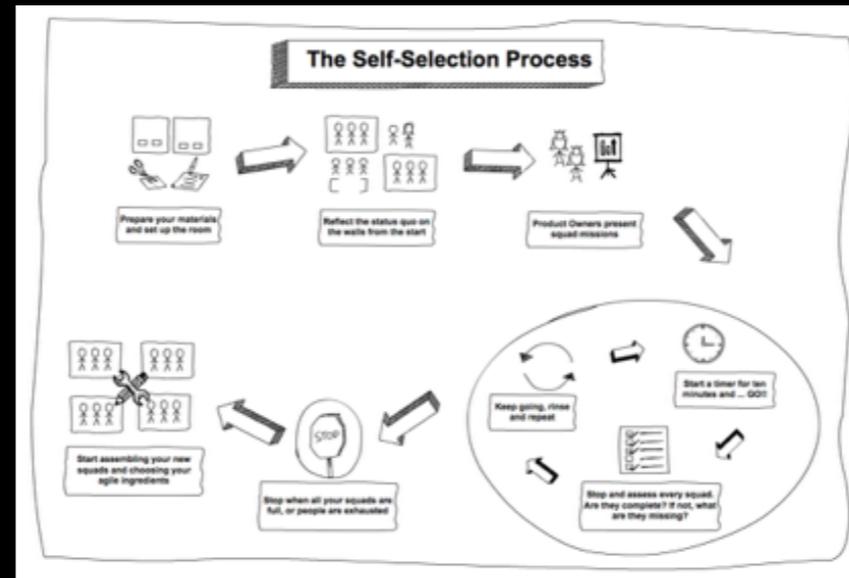
- Start early when possible!
  - Consider measuring happiness/engagement before the event
- Read *Creating Great Teams* by Sandy Mamoli & David Mole
- **Gain support from key leaders & influencers**

Having a powerful ally like I did in leadership and on the teams is important. You can't do this yourself.

# Preparation

- Choose a date (just do it, there's never a perfect time!)
- Introduce the concept/timing to the team
- Have resources and collateral for questions (Portal, FAQ, email address, etc.)
- Communication: Coffees & Q&A
- **Focus on benefits & make it clear that people won't be "stuck" on teams forever**
- Decide on team leads
- Prepare team plans with leads
- Plan logistics

# Run The Event



# Measure

- Ask for feedback
  - Are people happy with their new teams?
  - Why did they make the decisions they did?
  - What did they like about the process?
  - What can be improved?
- **In 2-6 months, measure happiness/engagement and compare to pre-self-selection**

# More Resources

- [Opower's Case Study](#)
- [Nomad8's Self-Selection Kit](#)
- [\*Creating Great Teams\*](#) by Sandy Mamoli & David Mole
- More Questions: [Contact Us](#)

# Q&A



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