

# Unleash Your Team's Potential

How to Use Self-Selection to Form Happy,  
Effective Teams

Amber Field

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**Stale Teams?**

**Increase in disengagement?**

**Retention Issues?**

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

**Want to learn a new skill?**

**Are you undergoing a  
transformation?**

**Building a new product?**

**Have you just been through  
a lay-off?**

**You can use this opportunity to make  
your teams **happier** and **higher-**  
**performing.****



**Across the board.**

# Enter, Self-Selection

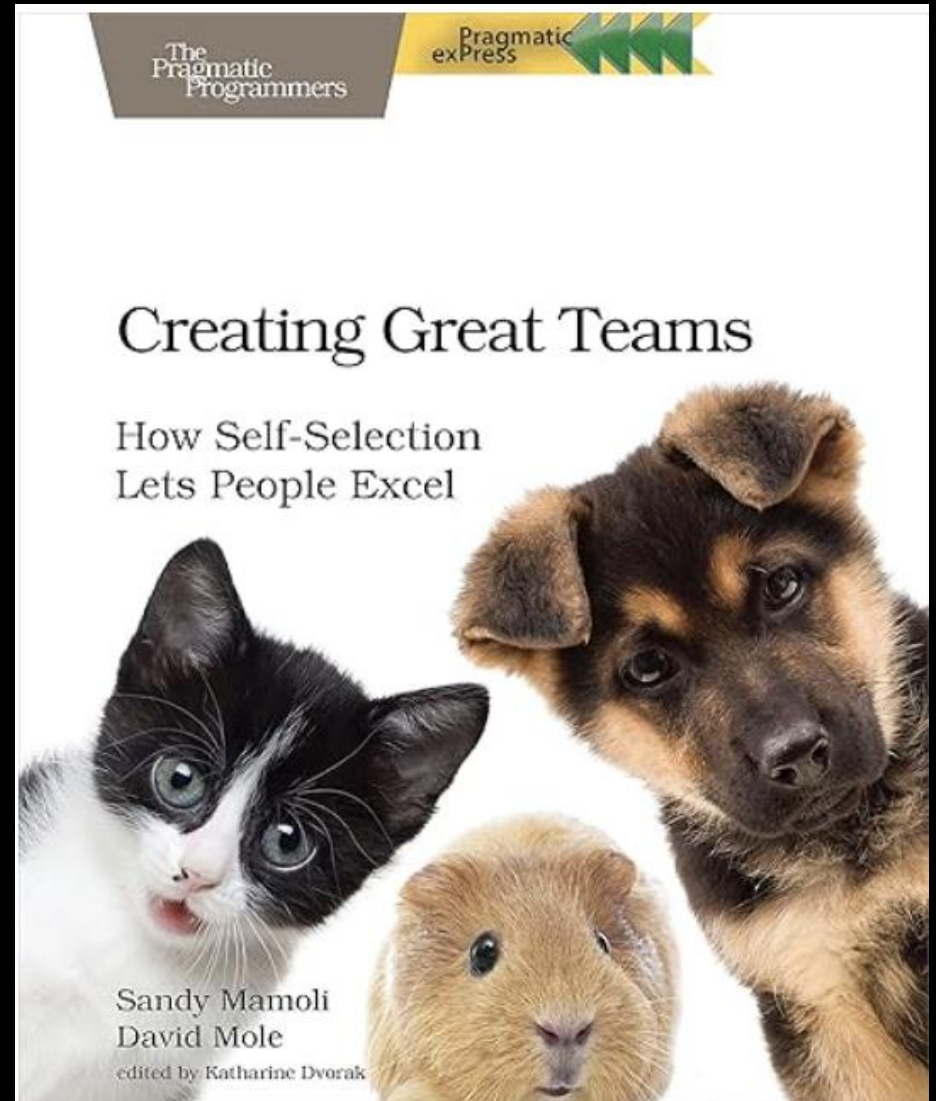
You can upgrade your teams in an afternoon...with a little prep.

# Amber Field

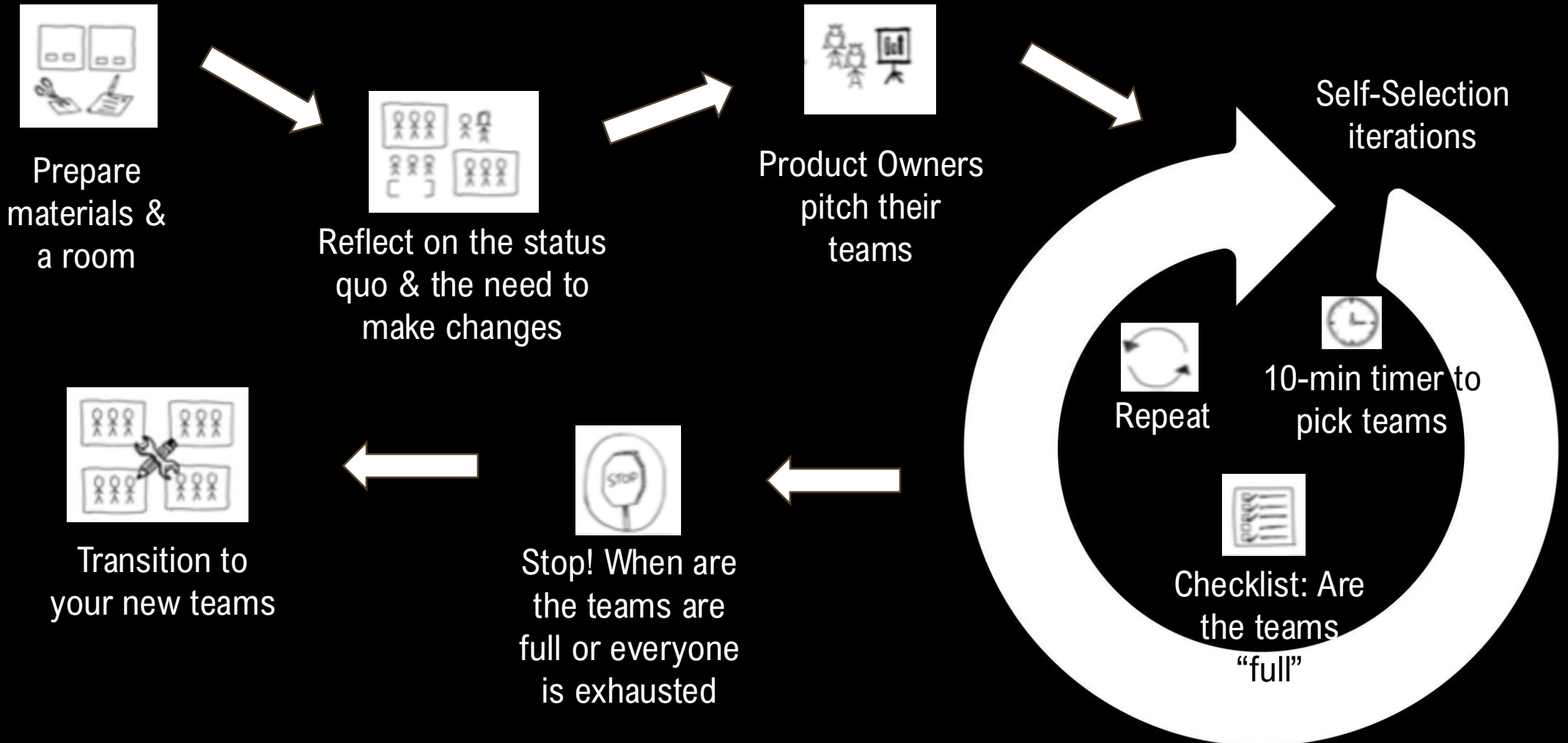
- Author, *Agile Discovery & Delivery*
- Lecturer, Comp Sci Capstone, UW-Madison
- VP Software Dev, Singlewire
- Head of Operations, CapitalOne Labs
- Co-Founder, O2 Agility
- Agile Program Manager, Opower (Oracle)
- Senior Project Manager, National Geographic
- Staff Software Engineer, IBM



# What is self-selection?



# Self-Selection Process



# What's the Secret Sauce?



Preparation & Rules!

# **Most Important Rule of Self-Selection**

Do what's best for the company!!

# Other Helpful Rules

- Team Size (e.g. Keep teams at 5-7 people each)
- Role Requirements (e.g. 1 UX Designer & 2 testers per team)
- Skill Requirements (e.g. 2 engineers on each team need to know React Native)
- Whatever rules you think are necessary to make your teams whole!

# How to Prep for Self- Selection



**2-6 Weeks**

# Self-Selection Prep Steps

1. Convince management this is a good idea. (Not part of the 2-6 weeks)
2. Anticipate fears. Plan talking points. Find a time for the event.
3. Announce self-selection 2-6 weeks prior with EVERYONE in the room.
4. Deal with fears. Check-in with everyone individually.
5. Measure team happiness and productivity before the event.
6. Work with Product Owners to form teams; create team sheets for the event.
7. Individuals create individual sheets for the event.
8. Order food. Find moderators.
9. Hold the event.
10. Transition: Typically one sprint, can be more.
11. 2-3 months later: Check-in with individuals. Measure happiness & productivity again.

# Set Expectations

- You may not get your first choice ( “Do what’s best for the company!” )
- If you don’t like your team after 6-8 weeks, we’ll help you onto a new one
- It can feel a bit chaotic in the middle of the event
- Your managers will not be in the room and they won’t “correct” the teams. No judgements. This choice is yours!

# Convincing Management

- This is the [toughest](#) part of planning self-selection.
- Talk to management.
- Send them articles on self-selection or the *Creating Great Teams* book.
- Remind them that it's less work for them.
- Tell them we can reset the teams in 6-8 weeks if it's not working.
- Collect data.
- Have them talk to people who have successfully been through self-selection.
- Enlist excited co-workers to evangelize the process.
- Get them on board with truly letting individuals choose.

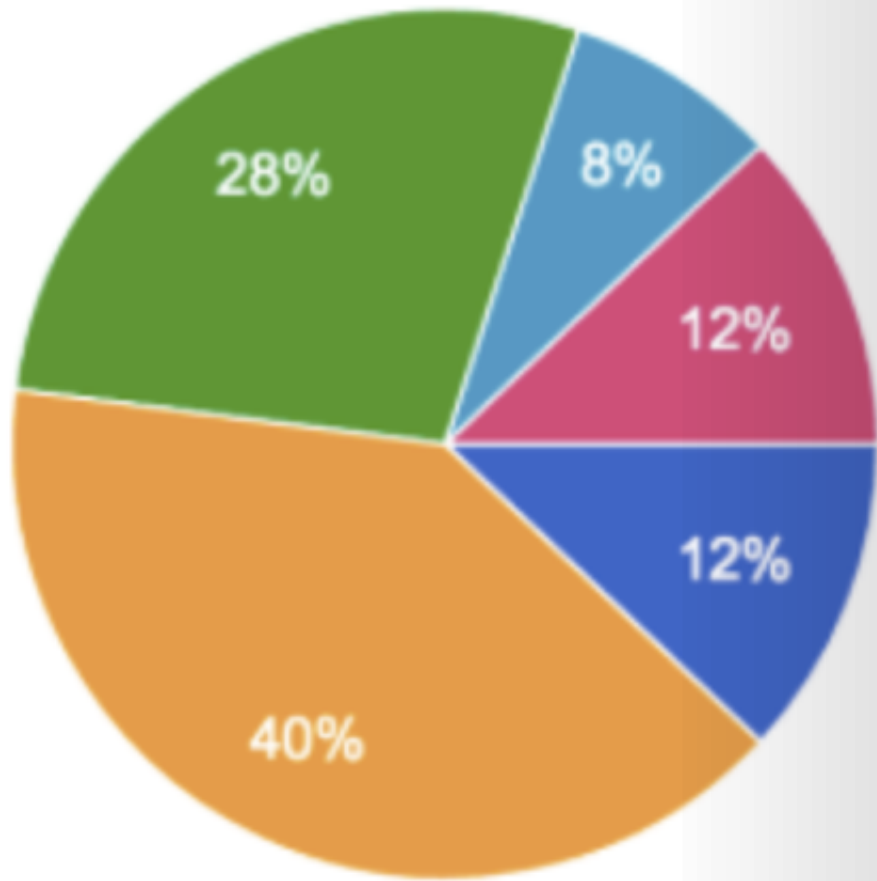
# What could go wrong?

(Don't worry, everyone will tell you exactly what they think will go wrong!)

Dealing with everyone's fears is the 2<sup>nd</sup> toughest part of planning for self-selection.

# Common Fears

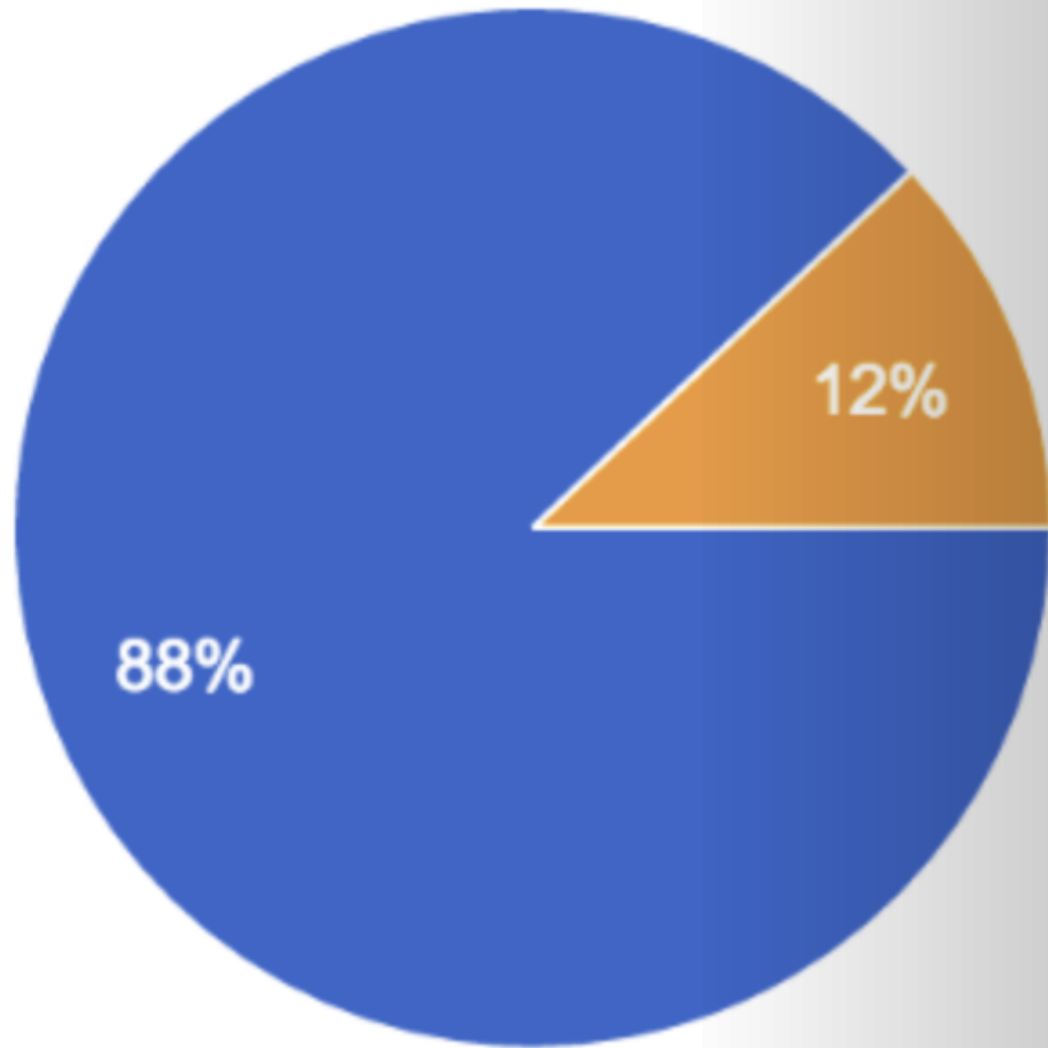
- What if someone else picks the project I want?
- What if someone is “last picked for the kickball team”?
- What if I make a mistake? Am I stuck on the team forever?
- What if there aren't enough people to fill out the teams?
- What happens if there's a stalemate?
- What about my current work/projects?
- What about the work that no one wants to do, but HAS to get done?



- Type of work
- Product owner
- Doing what was best for the company
- People you did want to work with
- People you did NOT want to work with
- Skills growth
- Other

**Why did you pick your team?**

Figure 2: What primarily drove your self-selection choice?



- Yes
- No
- Other

**Are you  
happy with  
your new  
teams?**

Figure 1: Are you happy with the teams you ended up on?

# Event Agenda

- Welcome everyone!
- Reflect on the status quo & need to make changes
- Product Owners pitch their teams
- Remind everyone of the rules
- Self-selection Rounds (typically 3)
- Celebrate!

# Again, What to Expect

- It can get a bit messy.
- No one will move in the 2<sup>nd</sup> round.
- Typically takes 3 rounds.
- Moderators are key.
- People will get creative!

# Ways to Be Creative

- Move multiple people at once.
- Shift work between teams.
- Have someone learn something new!
- Fill gaps with new hires or interns.
- Decide to sunset something.

# How Does This Work in Real Life?

- Deloitte: Engineer decided to become a business analyst; another engineer decided to learn Java
- Capital One Labs: Whole projects weren't funded because no one wanted to work on them
- Opower: Moved a chunk of work to a new team; gave one of our engineering leads a promotion
- UW-Madison: Still looking for the best golden rule!
- Most places: For every 100 employees who self-selection, we have 0-1 dissatisfied at the end
- Everywhere: We're never had to move anyone to a new team or recalibrate teams after self-selection

# Academia is a Bit Harder

- We don't have a common goal
- Job market is cutthroat right now
- I run a pre-selection using stack ranking, followed by 1-2 self-selection rounds

# Where to Find More Info

- *Creating Great Teams* by Sandy Mamoli & David Mole
- Nomad8 on Self-Selection: <https://nomad8.com/what-we-do/self-selection>
- My Blog: <https://amberrfield.com/self-selection/>
- *Agile Discovery & Delivery* by Amber Field (me!) – Has a section about self-selection
- Ask me for the slides! (afield@wisc.edu)

**Questions?**



# Thank You!

Check out my book, *Agile  
Discovery & Delivery*  
(Amazon)

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