Agile Team Facilitation
3 Days

This course is modeled after The ICP-ATF Continuing Learning Certifications (CLCs) on the Agile Coaching Track. It focuses primarily on the mindset and role of an agile team facilitator, while also providing group facilitation tools and techniques for effectively designing meetings and workshops that both engage the entire audience and drive towards agreed-upon outcomes. The learner will develop an appreciation for the art of facilitation as key to fostering collaboration and enabling self-organizing teams. In addition, participants will update their facilitator toolkits and gain practical experience leveraging them to facilitate specific agile practices towards successful team outcomes.

Typically, training providers will cover the required learning objectives for this course in approximately 21 hours of instructional activities over the course of three days.

Target Audience

Agile team leaders or aspiring team leaders with a passion for servant leadership and a desire to learn and practice the art of facilitation in the context of agile leadership and team coaching. Relevant roles include Project Managers, Scrum Masters, Agile Coaches and aspiring coaches, Product Owners, Product/Value Managers, analysts, and anyone with the desire to explore the power of facilitation.

Learning Objectives

The Agile Team Facilitator Mindset

- Defining Agile team facilitation
  - The purpose of this LO is to define the purpose, mindset and functions of an Agile Team Facilitator. At the most basic, the purpose of an Agile Team Facilitator is to facilitate the Agile practices, foster collaboration amongst team members, and generally support a self-organized team.

- Agile team facilitator behaviors
  - The purpose of this LO is to set the expectation that Agile Team Facilitators behave in ways consistent with Agile and are Agile role models. This includes becoming aware of, and growing into, the embodiment of Agile that one expects from an Agile Coach: namely, embracing servant leadership and displaying the behaviors that come with key mindset shifts detailed in LO 1.3: The Agile Coaching Mindset.

Development Path for Agile Coaching

- Defining an Agile coaching development path
  - The purpose of this LO is to lay out the developmental progression from Agile Team Facilitator to Agile Coach to Enterprise Coach. An Agile Team Facilitator (ATF) is a journeyman Agile Coach. Knowledgeable in Agile practices, the ATF is developing the basic skills of facilitation, mentoring or training and conscious communication, often

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within the confines of one or a few Agile teams. The Agile Coach is an ATF who has achieved an expert level in Agile practices and one or more knowledge domains (technical, business, etc.) while having developed some professional coaching skills and a significant level of skill in facilitation and mentoring and/or training. The Agile Coach’s purview is multi-team and looking out toward the wider organization. The Enterprise Coach (not addressed in this track) is an Agile Coach who has achieved advanced systems coaching, organizational development, culture change and leadership skills and uses those skills to affect organizations at large. The Enterprise Coach works at all levels in an organization to help the organization use Agile as a strategic asset of culture change and business value generation.

- Assessing one’s ability to serve the team
  - The purpose of this LO is to provide the learner with a one or more models for assessing healthy team functioning, especially the ability to identify clearly dysfunctional behaviors or circumstances. This LO also provides suggestions for dealing with such dysfunctional patterns and offers indications for when to call in more advanced Agile coaching skill.

- Calling for more advanced Agile coaching skill
  - The purpose of this LO is to set the expectation that Agile coaching is an ATF/AC/EAC team event. Successful Agile coaches (at any level) do not go it alone. Instead, they call on the skills and knowledge of the next developmental level when faced with situations they are not equipped to handle. For example, an Agile Team Facilitator would call on the help of an Agile Coach or Enterprise Agile Coach when faced with difficult conflict in the team, or when starting up a new team, or when the team has stagnated and is regressing. These are opportunities for the team to get the level of skill they need and for the Agile Team Facilitator to learn from the more advanced coaches. This LO will offer models(s) or diagnostic(s) that help the ATF know when to call for the assistance of an AC or an EAC.

Facilitation & the Facilitator Stance

- Definition of facilitation
  - The purpose of this LO is to level set on the definition of a facilitator as a neutral process owner for group work and decision making.

- The facilitator stance
  - The purpose of this LO is to help the learner understand and embody the characteristics of a good facilitator.

- Agile team facilitator
  - The purpose of this LO is to help the learner effectively navigate the sometimes contradictory roles of unbiased facilitator and guardian of the Agile team practices.

Facilitating Meetings

- Designing meetings for collaboration
  - The purpose of this LO is to provide the learner with a set of planning tools and techniques to design effective meetings, including a process to clearly identify the
objectives and intended outcomes, a detailed facilitator guide or script, selecting the right participants, and identifying potential issues.

- **Using the meeting organizing tools**
  - The purpose of this LO is to provide the learner with an understanding of common meeting tools, their purpose, and when and how to use them. Facilitators use a variety of meeting organization tools including; parking lot, group norms, and room setup.

- **Facilitating full participation**
  - The purpose of this LO is to expose the learner to different techniques to garner full participation without promoting chaos such as; brainstorming, silent working, prioritization, multi-voting, etc.

**Facilitating Collaboration**

- **Facilitating collaborative conversations**
  - The purpose of this LO is to give learners techniques to facilitate better, more meaningful intra-team dialogues by maintaining awareness of one’s own style, gaining understanding and acceptance of other styles, and increasing the capacity to give and receive feedback. Through better conversation teams establish shared understanding, context and create better results.

- **Facilitating team decision-making**
  - The purpose of this LO is to familiarize the learner with decision making frameworks and how to select an appropriate one. Additionally the learner should know how to clarify scope of authority and know when to move toward a decision and when to let it ‘brew’.

**Facilitating a Meeting**

- **Facilitating a meeting**
  - The purpose of this LO is to practice using some of the facilitator tools and mindsets in the context of an actual meeting that occurs within the Agile framework. This application allows the learner to practice the many facilitation skills they have just learned.

**Setting the Facilitation Context**

- **Choosing the level of facilitation intervention**
  - The purpose of this LO is to help the learner to become choiceful about the amount of facilitation required, keeping in mind that the level of involvement differs as the team matures and as they begin to take on facilitation duties themselves.

- **Protecting the team boundary**
  - The purpose of this LO is to equip the learner with techniques to foster and help the team build an environment of focus which includes the ability to push away interruptions, distractions and additional work. This LO illustrates how to use the Agile process to respectfully manage scope at the iteration and story level.

**Facilitating Chartering Activities**

- **Project chartering**
  - The purpose of this LO is to bring the learner’s attention to what is essential and not
Facilitating Collaborative Meetings

- Team chartering
  - The purpose of this LO is to bring awareness to the importance of team specific topics (e.g. definition of done, iteration length, stand up time) being defined by the actual team rather than management.

- Facilitating release planning
  - The purpose of this LO is to bring the learner’s attention to multiple ways of conducting release planning and when to choose one over the other. Additionally, this LO educates the learner on avoiding common pitfalls of facilitating release planning sessions (e.g. over or under-committing, not accounting for bugs, spikes, and stabilization or planning to deliver lower value over higher value to accommodate an impediment or dependency, not delivering end-to-end value, etc.).

- Facilitating iteration planning
  - The purpose of this LO is to bring the learner’s attention to multiple ways of conducting iteration planning and when to choose one over the other. Additionally, this LO emphasizes facilitation that enhances whole team collaboration, knowledge transfer, and cross-functional interaction and avoids common pitfalls (e.g. people are checked out, business people getting into the “how”, domination by an expert, tool-centric interaction, etc.)

- Facilitating retrospectives
  - The purpose of this LO is to familiarize the learner with multiple facilitation techniques for retrospectives and help them know when and how to use them to design and conduct retrospectives suitable for the team’s current situation. Retrospectives provide a fresh perspective on the previous iteration (or other timeframe) so that the team can surface issues, celebrate success, brainstorm solutions, and choose the top insights that will make a positive difference in the next iteration. This LO conveys the key elements (e.g. trust, safety check, ground rules, prime directive) that help retrospectives be productive and also illustrates how to work through common pitfalls (e.g. turning into a complaint session, lack of safety and fear of repercussions, non-collaborative, etc.).

- Facilitating stand-ups
  - The purpose of this LO is to bring the learner’s attention to various techniques to keep the stand-up fresh while ensuring it remains useful and “on purpose”. This LO emphasizes facilitation that safeguards the stand-up as a venue for daily commitment, raising impediments, and keeping momentum while avoiding common pitfalls (i.e. going