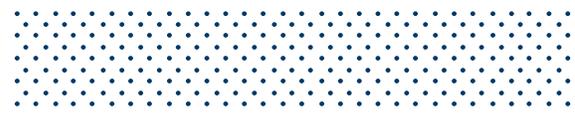# Effective Remote Daily Standups

CAPTECH TRENDS | PODCAST | EPISODE 3 TRANSCIPT

Vinnie Schoenfelder

Hello and welcome to CapTech Trends, a place where we meet with thought leaders and subject matter experts to discuss emerging technology, design, and project methodology. I'm your host Vinnie Schoenfelder, Principal and Chief Technology Officer at CapTech Consulting.

In our previous two podcasts, we explored some of the characteristics and attributes about high performing teams and we did this through the lens of the unique challenges presented by COVID-19 and the unique work conditions that puts us in. We keep getting questions about this from our clients and so we're going to go a little bit deeper today on how to run an effective standup meeting. I promise, in the very near future we're going to have some deeper technical podcasts, but we're hitting this hard now because it seems to have the biggest impact for our client base.

Joining me today is Karen Rodd and Jesse Fife. Karen is an experienced Agile coach and enterprise transformation lead and one of the founding members of CapTech's Agile practice. She's also a SAFe coach and trainer – Scaled Agile Framework coach and trainer. Jesse is an experienced Agile coach who has been running fully remote teams before COVID-19 and can share some of that experience with us. Karen, Jesse. Hello.
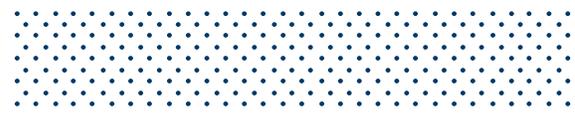
Karen Rodd

Hi, this is Karen Rodd.

Jesse Fife

Hey, this is Jesse.

Vinnie Schoenfelder

So before we get started, I know most people have a basic understanding of standup meetings, even if you're not familiar with the Agile methodology. But for those who don't, it's a daily meeting and it's first thing in the morning and it's typically co-located, so everyone's in the same room. You stand up, sometimes you pass a little ball around and whoever has the ball can speak. And it is a very quick meeting. The standup part of it is designed so the meeting is short, so if you get tired cause you're standing too long, you know you're running on too long. But it's very simple. What did you do yesterday? What do you want to do today and what are the blockers or impediments? And it's a very good way to get accountability and transparency into your project delivery. Specifically, Karen getting into this, I know we're gonna have a lot of ideas, and tactical ideas later, but as we move from a co-located standup practice to a remote standup practice, what are some of the high level ideas and concepts that you want to

discuss today?

Karen Rodd

Yeah, thanks Vinnie. I think the things that we want folks to really kind of focus on and take away from today are how to make your standups as close to in-person as possible, and simulate reality as much as possible during your standups. We'd love for them to be able to focus on impediments and team member coordination so that your standup isn't just giving a status update. And lastly, we'd like to ensure that we have good follow-through on our actions following standup.

Vinnie Schoenfelder

So, one of the things I was thinking about when I was preparing for this is day one of the team, it's not highly effective, right? You, you build into a highly effective team. And there's a lot of discussions, I think we talked about this in the previous podcast about keeping project teams together because you keep that mojo going, right? And you know, the analogy I like to use is your favorite TV show, like Seinfeld, showing my age. But if you are watching Seinfeld and it's season five and you see how good they are. Then you go back and you watch season one, episode two, and you're like ,"oh my gosh, how did they ever approve this to get to go further?" Right? You can see the evolution of the characters and how they work together. So these team norms, these patterns of behavior, did they start to break down when that team goes from being co-located and working side-by-side everyday and now they go into a remote environment? And if so, how do you get that groove back?

Karen Rodd

Yeah, so they do start to break down when we're remote. In fact, a lot of things start to break down when we're remote. One of the biggest things is that communication breaks down when we're remote. And quite honestly, what happens with teams is they come into standups usually not knowing what a standup is or the purpose They've heard about it, they've been told to go. So they walk in, you know, just kind of going through the motions. And when you're remote, that actually emphasizes that need to stay silent because you're not co-located, you're not in person. So communication really breaks down when you're remote. Another thing that also breaks down when you're remote is being disengaged. So just sitting back and being anonymous when you're remote as well. So being able to simulate that does break down as well.

Jesse Fife

Yeah, and building off that – those are great points, Karen – I think one of the things that

happens to teams, and it can be a real pitfall, is if all of a sudden you're in a situation like you are now where you're remote and you're not used to it, is you just try to work with your same team norms. Well, you're not in it the norm that you are used to anymore. So, you need to readjust and take a look at those team norms, to Vinnie's point. And so, you know, pretty quickly on into this, and if you haven't done this as a team, you should do it as soon as possible, is revisit your team norms. Do a session on that to kind of talk about the differences in this world versus what you're used to in person.

Vinnie Schoenfelder

Do you see people pulling back into, I guess, their personality traits? So, if you're an introvert or an extrovert, are you finding that the introverts are speaking less remotely and that the extroverts are filling that void?
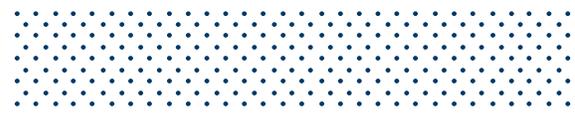
Jesse Fife

Yes, that's definitely possible. It's a lot easier to kind of hide behind that anonymous virtual wall when we're all remote. And so, something that we really try to encourage is the use of video, because as we mentioned in previous podcasts, you know, the next highest quality after in-person communication is video communication beause we take a lot of cues from a visual in what we see of people's faces and reactions. So, that's key and it makes it a little bit more engaging and less likely that you're going to hide behind kind of virtual wall and kind of fall back into that maybe more introverted personality.

Karen Rodd

Yeah, something that I've noticed here recently – I'm a huge extrovert, I never thought of this before – but sometimes standups unfortunately is the only touch point during the day, especially when they're remote. They do fall out of that habit of being able to walk over across the room or across the building and talk to someone. So ,they do fall out of the habit of talking frequently and often throughout the day. And as an extrovert, I crave that human interaction, so I actually go to the opposite end of the spectrum. And I've seen this happen on remote teams who are extroverts as well. They actually reach out more often, so they're more disruptive when they're in a remote environment because they're trying to get that touch point more.

Vinnie Schoenfelder

Yeah, and Jesse, you mentioned keeping the video camera on. Karen, when I was looking through some of your notes prior to this podcast, you had a note that says "keep the mute off" so that people are on full time. And that I was like, "I don't like that" because when I'm on

these conference calls all day, I'm hearing kids in the background and dogs barking, you'll hear an echo. And sometimes the feedback is tough, we're trying to promote, "hey, if you're not talking, mute." So that to me kind of jumped out as why would you want to do that? So explain why we have a difference of opinion there.
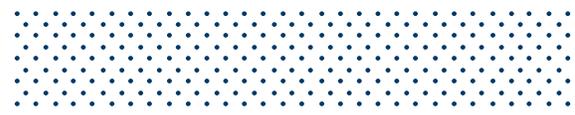
Karen Rodd

Yeah, and you're not the only one that has that goes, "woah, why are we doing that?" Most of the teams I work with had that same reaction. The reason why we have "no mute" or "mics off" constantly open during a standup is one, it's 15 minutes, you can sit through anything for 15 minutes. Two, it's usually the start of the day, so it jumpstarts that touchpoint, that humanity, it lets people know we are real, we are human, we're all here together. And it creates a free flow of conversation, so we're not starting and stopping. We're not creating artificial silence. People can't check out, they're on the call. It also helps to make people feel as though it's okay to live your life. It's okay to be remote. It's okay to be sitting in your kitchen or your dedicated office with the door open. It's okay to have dogs barking because we are getting real work done, and that's okay. In an open space – a lot of the open space concepts that are really popular right now which is where everybody just sits in a big open room all day long multiple teams and a big open room – that doesn't work so well for an open space. So I wouldn't recommend it there. Tt's very situational where you recommend it. But we're trying to create closeness. We're trying to create connection and a 15 minute standup is a perfect place to do that and experiment that within.

Vinnie Schoenfelder

Yeah, I guess that goes back to your first point, which was keep it as in-person as possible. And I guess that that does speak to that. So yeah, so we talked about getting your groove back after going remote. What if you weren't agile before this and you're starting fresh, you didn't have time to establish a groove, even get that groove back. It seems like it would be more difficult to get proper team dynamics set up in this remote environment if you didn't have the cadence beforehand.

Jesse Fife

Well first off, if you're jumping into this to be an agile team at this time, kudos to you because that's a great undertaking and additional challenge when you're remote. But yeah, there are some challenges there and really what you need is a strong scrum master facilitator to kind of step-up and take ownership of getting the team together and doing the team norms, like I said before. So coming to an agreement on how the team is going to work together and how and when the standup is a big part of that. But also making sure that you understand the tool that

you're using and that the facilitator can quickly take care of what's going on in the tool. So there isn't that kind of lag in what's going on and setting good expectations of you know, following these steps, the three questions that you mentioned earlier, Vinnie. And then making sure we have smooth communication across that. And as you're building confidence in that, you can do something – and I know Karen can talk to this a little bit more – to can encourage participation and engagement by rotating facilitators. And that's something that really helps keep people engaged and kind of share the load and branch out in a safe team space.

Vinnie Schoenfelder

Karen, talk about that more because the idea of rotating the facilitator is interesting to me. Why, why do you do that?
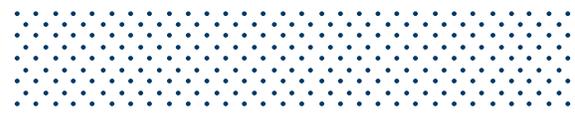
Karen Rodd

I like to rotate facilitators because it lets everyone on the team experience what it's like to facilitate. So that's a really good opportunity for people to learn. It also helps people get comfortable with being uncomfortable. So, facilitation is very difficult, it's actually one of the most unsung heroisms on a team. So, it lets people get more comfortable with being uncomfortable. And then also it allows them to grow that skillset so they can take that opportunity and apply that to other areas or other ceremonies within within the framework that they're using.

Vinnie Schoenfelder

Great, thank you. At the beginning of this podcast, I promised we'd be very tactical and I don't feel like we've been tactical enough yet. So let's get very specific. Maybe you guys can just kind of chat back and forth on this. What are some of the key points? If you were going down like the bulleted list in your brain of single statements, things that you should be doing that are more necessary now than they were two months ago.

Jesse Fife

So, going back to those three points that we mentioned at the beginning, one I think we've talked about this decently already is making it as close to in-person as possible. So, video communication and making it feel like we're close and chatting with each other. Something that you can do to make it feel a little bit more personal as well is an icebreaker or something at the beginning that gets people talking. Because I know personally for me, if I speak in the first minute or two of getting on a call, I'm a lot more likely to chime in a lot later. Whereas if I'm quiet and there's kind of this dead silence at the beginning, it's a lot easier to kind of go

back into your shell and kind of just be more of an introvert and quieter for the rest of the call.
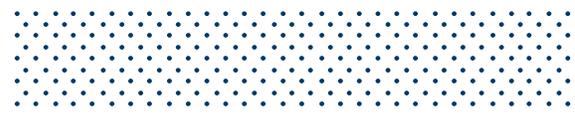
The other things that we can do, and we should really talk about these a bit more, is focus on impediment removal. We don't want it just to be a status update, we want to really focus on solving problems. If they can be solved, immediately they're in the standup quickly, that's great. But again, we're time boxed. So we need to have a good facilitator who can take that like, "hey, it sounds like we need to have a follow up conversation." And you know, summarize back what you're hearing and then make sure we have some ownership of what's going to happen afterwards to follow-through on that. And that's the third point which was ensure follow-through because we're not in-person, we're not bumping into each other. We have to be a little bit more proactive and go out of our way to make sure we're clear and understanding that these are the steps that we're going to take out of standup to resolve those impediments that were raised.

Karen Rodd

So Jessie you talked about turning your video on and sharing your face. That's great, absolutely do that. That visibility isn't just for your physical self, it's also for your impediments, I loved how you mentioned that. I actually put on that visibility on the impediments within the tool that you're using to show your work. So impediments get an aging time. So we make those impediments really crisp and clear and in your face of "how long has this been going on?" This has been an impediment for three days, because when you're remote that does go to the back of your mind. It is easy to let that kind of go off to the side and on the fringe. So you need to work harder at making those things really, really clear to the team and upfront and visible. So I like to have impediments, you know, really called out for the team. It's something that's always present and shown all throughout the day.

Jesse Fife

And something that we haven't mentioned, but you know some teams are used to in-person having physical boards, Kanban boards. We're looking actually at Karen right now and she has a Kanban board behind her. So something that she does personally even, which is great and true Agilist right there. But you know, if you're used to the in-person physical board, you can't do that when you're remote. So the facilitator, the scrum master needs to find a simple, easy tool. Something like a Trello, or you can even use Microsoft teams, to create a visual virtual board. And make sure as a facilitator you're sharing that board so everyone's seen it. And something that we do in person is walk the board. So we're walking through and making sure we don't overlook any of the items that are in our Kanban board or our scrum sprint board and making sure that we're touching on each of those. And then to Karen's point, if you have

impediments, you can see some of the tools, like JIRA or Version One, the age of how long have those been stuck or is there a flag on that that we need to make sure we're looking at those in particular to resolve.

Vinnie Schoenfelder

This is interesting because I'm thinking of it from a management perspective, like an IT management perspective. And what I wouldn't want in a large organization is all my different Agile teams all adopting different tools for this. Some may be free, some they may be expensing, some may be extensions to the software we currently have but change the subscription model. So maybe this is more of a Scaled Agile Framework thing, but are we asking individual project teams to come up with their own toolkits if they didn't use this before? Or is this something that from a CIO perspective, they have to roll out additional enterprise tools to support remote delivery?
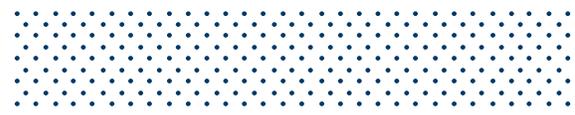
Karen Rodd

Yeah, I think if it comes down to are we trying to roll this up to get a landscape of reporting structure? Yeah, if we have divergent tools or different tools, that roll-ups not going to work out so well. So we would want to have a standardized tool set that that teams have for reporting or for managing and tracking dependencies, so we can have that across the organization. If it's something that's going to help the team, we do like to give them the right to decide what's going to set them up for success.

So if it's managing bugs internally and that's not something that we need to have shared across the organization, great. Go ahead and use what you're comfortable with it. If that's Excel, if that's an automated tool, whatever. If it's for retrospectives, if you love idea boards then go ahead and use that. If you like Mural, then you can use Mural. That's not something that we're going to all be using together. It's when we have to integrate that information or data, that's when we want to have some consistency and standardization and we want the teams to be included in that because teams usually have preferences on what their tools are and they'd have experience using them. So, we like to get them together so they can provide input and collaboration with the people that are actually making the decisions.

Jesse Fife

Yeah, and if you're in a scaling model you're going to want to have a similar tool, the same tool. And one of the important ceremonies, outside of the standup, when you're scaling is to have a scrum of scrums or agile release trains sink. And this is kind of the next level up where the scrum masters are generally the representative, sometimes the product owner as well, and

they're meeting together to talk about dependencies across their teams. So, this is a level above the teams in is a lot easier if you're all in the same tool where you can see where these dependencies are and you can even tie those different work items to each other. So, having those scaling ceremonies outside of the standup, they're very much functioning in the same kind of format as the standup, but above the teams having the same tool in the same kind of format and understanding and practice makes it that much more seamless and smooth.

Vinnie Schoenfelder

Has this affected the story estimation sizes? So, I can see if I'm in the standup and we have our conversation and we all get to work. If we were co located and I had questions or follow ups, it's really easy to pick my head up and ask the question. So are we scheduling more communication throughout the day? Is that creating an increased burden, context switching? Because for developers it takes 30 minutes, 40 minutes to get into the flow. And if you're constantly pulling out to have these additional meetings and additional follow-ups, is that effecting your velocity?

Karen Rodd

Yeah, it definitely does. So that's why we're really intentional and purposeful about when we pull the team, when we engage them in, and when we don't. We have set regular cadences for meetings, for syncs. We also have core hours, that's a really common technique that a lot of Agile teams use. So specific time blocks during the day where it's heads down, we don't schedule meetings. You don't call me, you don't talk to me, unless it's critical urgent and it's going to be affecting multiple areas of work. And that's up to the team on when their core hours are. But we also make that visible as well. So, we communicate that out to the organization too and say, "hey, this is one we're going to be heads down. If you need to meet with our team, we'll be happy to do that outside of these particular timeframes between one and four."

Vinnie Schoenfelder

That seems like a really important step and probably a difficult one, because you know, Jesse, you've managed remote teams before. This is different. Because not only am I remote, my spouse is remote, my kid is also home trying to do remote learning for school. So you know, a block from eleven to one or eleven to two may have traditionally worked for me, but now that's also a time where my wife needs to be doing conference calls or my kid needs help with online school. So I can imagine everyone has many more conflicts than they did in the past, multiplied by more people with more complex conflicts. It just seems like that would be a difficult thing to agree upon. How do you guys handle that?

Jesse Fife

Yeah, that is definitely something that we're all dealing with now. A different work schedule, different people in the house. So I think it's tough. You need to kind of balance the idea of having core hours in a rough sense of when you can reach out and when you need to have it be heads down as a team. But you also need to understand that in the world that we're living in, when everyone is confined to a house, there are times where we need to be a little bit more flexible. And so some people need to take some time out in the middle of the day and can have some time later in the evening to wrap things up. If that's the case though, let's be really explicit and upfront and sharing what your availability is so people aren't expecting –if there is kind of a rough core hours time – that you respond and you're not there because you're off doing a quick errand that you only have time to do then or something like that.
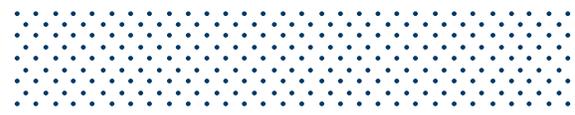
Vinnie Schoenfelder

It kind of speaks to flexibility, right? If you're still trying to do a 40 hour work week, I think our work days are stretched out now. And I work seven days a week now. And you're doing some personal things and some work things and it's, it's sort of like Groundhog day. Every day is the same, there's no differentiation between the days. But from a project delivery team, I could see flexibility of allowing people to work late at night, early in the morning, or over the weekend, you know, and still managing 40 hours the best way it suits them.

Jesse Fife

Just real quick on that. If you are working late hours though, make sure that you don't always just assume that everyone else is working late hours. So you can't just reach out to someone at eleven o'clock at night and assume a quick response. So again, that's part of the team norms. Being explicit about understanding. If like, "hey guys, today, or this week, or just in general, I'm a little bit more of a night owl and that's when I have time cause that's when the kids are asleep, the dog is asleep, so that's when I'll do some of my work." But come to an understanding of when the best way, cooperation time as well.

Karen Rodd

I'm glad you mentioned that Jesse. I was actually just going to say this is really difficult and this is actually probably one of the single biggest things that we're hearing from our clients is, "hey, I've always worked from home, but it was on my terms and my schedule and not everybody else was jammed in the same house with me. What do I do about this?" I would recommend frequently retroing. So doing a retrospective with your team or with yourself and saying, "what's working? What's not working? What should we change?" I would say do that

once a week or maybe everyday, every couple of days. "Is this working for us?" If it's not, "what do we need to do differently?" And then also sharing those learnings of what's not working and what is working across your organization or across your teams. Because one team may have tried something or one person may have tried something that didn't work for them, but it might work for someone else.
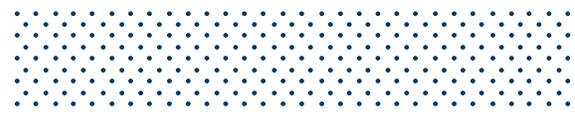
Vinnie Schoenfelder

As you were saying that, it made me think of something, Karen. As we move into the summer, I don't think recovery is going to be buoyant where we're all okay, we're all at home, and now we're all back at work and we're all going to the movie theaters and restaurants. Right? I think it's going to be progressive where restaurants open up, but they have 50% capacity and the tables are twice as far apart. I think that's going to happen with our workspaces too where offices will reopen, we have team rooms, we have tables and tables and tables with dual monitors on them, and we're going to have to go every other as opposed to side-by-side. So I think we're going to move from this environment where, yeah, we were co-located team, now we are a remote, fully remote team, and then there's going to be some weird hybrid we move into over the summer where sometimes we're on site and sometimes we're not. And then people are going to be in different camps. Maybe it's every other day, maybe it's more distributed, right? So what do you guys see, two months from now, in terms of moving to a hybrid model?

Jesse Fife

So a lot of the engagements and clients I've worked with, that's actually been kind of the setup anyways. I've been traveling and I'm not necessarily traveling there five days a week. I'm there maybe four days a week. So I'm already doing 80% in person in 20% remote. And that's often the case, and there's some flexibility. More and more often with clients they understand that one or two days a week people can and will work from home. So, I think we'll kind of get back to that model. And if that is a new model for some people there is an adjustment. And again, talking through team norms is an important thing to do. But the important thing to keep in mind when you have this setup, is to not favor one over the other.

And the easy one is to favor the in-person people over the remote folks. So if it's a rotation it might be less of an issue, but if there's teams where, one or two people are in a different state and the rest are co-located, you've got to be really careful to not to forget about the other folks and make sure that they're included in the team just as much. So the same way you're going through and making sure everyone's talking and engaging at standup, make it as feel as close to as person in-person as possible. Whether, you know 80% of the people are in-person

or 50% of the people are in-person, and the others are remote.

Vinnie Schoenfelder

I've seen that on projects as well. And we've done things like having a full day video conferencing and on a big screen too so it feels like they're in the room. That can be problematic work. We're kind of towards the end here. I put some mental notes in my mind as we were going through listening to your guys' recommendations. So, I kind of want to run through a quick hit list of things and then if I miss something, just let me know. But for when we're going to focus on the standup side of this:

- Keep it shorter, relevant
- Rotate the facilitator
- Open mics, open camera
- Try to have a speaking order so people aren't talking over each other
- Try to do at the same time everyday
- Allow for breaks during the day so people aren't being bothered.
- Allow for longer estimation times or slightly slower velocity because of the increased need for communication.
- Focus on the impediments and make sure that you have communication throughout the rest of the day.
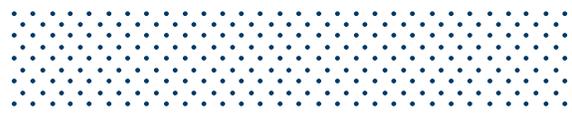
You know, based on those impediments, is there anything else that I missed guys, that you wanted to specifically call out?

Karen Rodd

Hey, yeah, I would really encourage folks to try these things, try these techniques. But experiment, test and learn. See what's working for you and then talk about it and then make changes because it's all going to be a learning experience for everyone.

Jesse Fife

Something that I'm really, really key on is a facilitation skills and this is a great opportunity to flex those skills, to grow those skills. So, you're going to have to grow them in a different way than you do in-person. So, really make sure that you're leveraging different facilitation skills as a facilitator, making sure that people understand speaking order. If you can do some kind of like raising of the hand virtually, good reason to be on video, passing a virtual token, or if people are okay with it, the facilitator is calling on people one by one. But also as a facilitator, making sure that we're really understanding each other since we're not in-person and we'll

hang up and not be in the same room, we can't ask immediate follow-up questions as easily. Pepeat back to people, "what are you, this is what I'm hearing. Is that right? Okay. It sounds like a person X and person Y said that they're going to do a follow-up after this is, are you guys good with that plan?" And if so, you know, just making sure that you really repeat back what's going on. These are good facilitation skills at any point, but particularly when you need to make sure that the communication and follow-through is happening.

Vinnie Schoenfelder

We should mail out Hawaiian leis to everyone on the team and whoever puts the lei on is the one speaking, wear a hat, something visual that's like it's my turn to talk. Well great, thanks guys and thanks everyone for listening. I know it's a tough time so please take care of yourself and your families. Stay healthy and we're looking forward to moving into this hybrid model, hopefully pretty soon. Stay tuned, like I said, for more technical podcasts in the future and probably some more design focused as well.