ORID Retrospective Facilitation Guide

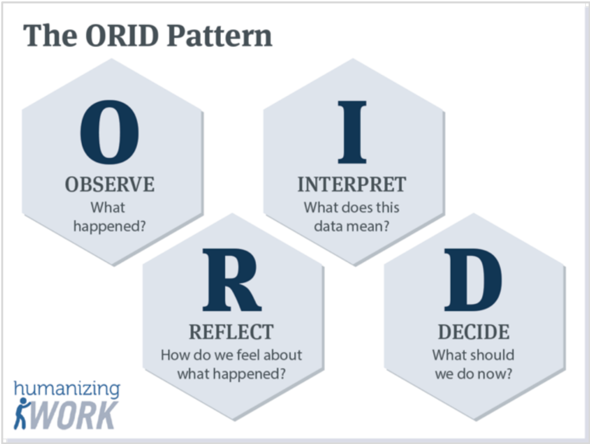
This facilitation guide is excerpted from the Humanizing Work online course,
Facilitating Effective Retrospectives.

This retrospective format is super simple, takes almost no prep work, and can be facilitated with almost any toolset. We'll illustrate the facilitation using Miro as the collaborative tool, but you can recreate the basics of this retro in almost any tool. It's a great improvement over most of the popular quick retrospective formats out there (like start/stop/continue, plus/minus/delta, etc.) since it follows the ORID structure described in the fantastic book: The Art of Focused Conversation, but in a very light touch way.

If you're unfamiliar with the Focused Conversation approach, we're going to provide a summary here. If you are already familiar with it, skip down to the section called "When to Use This Retrospective"

Focused Conversation & the ORID Pattern

In the Focused Conversation approach, the facilitator asks questions and uses activities that address these four topic areas in order:



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Observation

What happened? What are the observable facts? Timelines, metrics, anecdotes, etc.

A retrospective facilitator can gather and visualize much of this information in advance of the meeting. In a shared virtual space like a Miro board, gather information like,

- The planned sprint backlog with the state of each item at the end of the sprint
- A burndown or, better yet, a cumulative flow diagram for the sprint
- A timeline for the sprint with any events that happened such as training, vacation, sick time, emergent work, impediments
- Feedback captured from the sprint review
- What you planned to do out of the previous retrospective and what happened with that experiment

Then, as the group gathers, give them a moment to review the board and ask, "What other facts from the sprint are missing that we may want to reference later?" Add anything new that comes up.

Note: It can take some practice to distinguish facts from feelings and interpretations. The facilitator may have to repeatedly point the group back to shared, objective data. When someone makes a claim about something being good or bad, ask, "What did you observe that makes you draw that conclusion? We want to capture objective data now and save the interpretation for later, once we see all the data together."

Reflection

How do we feel about what happened? Skipping this step can lead to strange, emotional conversations when trying to make sense of the data or when deciding on next steps. Take time to include your feelings in the data.

Few work teams find it natural to discuss their feelings. They lack a good vocabulary for emotions and may not feel safe opening up in that way.

The easiest place to start is with motivation. Ask the group to graph their motivation along the sprint timeline. Or give each person 1-2 blue dots to highlight facts on the board that are motivating or exciting for them and 1-2 red dots to highlight factors that are demotivating or frustrating for them.

Want to go a little deeper? You can use a resource like the [NVC Feelings Wheel] to give everyone shared language about feelings.

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Don't belabor the reflection step, but don't make the mistake of skipping it either. In the course, we demonstrate several ways to quickly gather reflective data in Miro.

Interpretation

What does this data mean? Look for trends and patterns. Find root causes. Think about likely effects.

"What went well?" "What didn't go well?" and, "What should we improve?" are all interpretive questions. The reason +/-/Δ so often fails is that it goes straight to interpretation with shared data.

Once you've completed the Observation and Reflection steps, you're ready to ask questions like these:

- "What is helping us maximize our impact?"
- "Where are we experiencing ease in our work?"
- "What is hindering us from having as much impact as we'd like?"
- "Where is the work harder than it needs to be?"

And then, "What might be causing that?" or "What patterns do you see around that?"

The answers to interpretive questions are subject to discussion and debate. But they should always point back to the shared data. Sometimes, you discover you need more data. It's ok to take a step back and add more observations, but make sure it's clear to everyone what you're doing.

At the end of the interpretation phase, everyone in the meeting should be more aligned about what's really going on.

Decision

What should we do now? This is where you make a plan to improve in the next sprint.

Consider framing your decision as an experiment. Define a hypothesis. Design a test to carry out in the next sprint.

For example, a team who started all six of their sprint backlog items and failed to complete them might arrive at the hypothesis that reducing their work in progress (WIP) would lead to getting more backlog items done (and, thereby, having a greater

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impact). So, they could design an experiment for the next sprint of explicitly limiting their WIP to 2 items.

When to Use This Retrospective

This lightweight design moves through each of the four ORID steps quickly and directly, so it is our go-to approach when the Sprint or other retrospective timeline has been fairly straightforward: a couple of weeks long, nothing very unusual happened, it was kind of a normal Sprint.

If that's not the case, we would almost certainly design a more in-depth path through the ORID steps than this one.

For example:

- If emotions are running high, we might need to take more time to address those before the team would be ready to share objective data.
- If something happened towards the end of the Sprint that might dominate the team's memory, but isn't the only important thing that happened, we might use a timeline design to try to mitigate recency bias.
- If there are some power imbalances showing up on the team or between the team and others, we might need to design some techniques to ensure all voices can speak safely and be heard.

But, since most Sprints are "another Sprint", we find ourselves using this format quite a bit. Even for teams not using by the book Scrum, we see lots of value in this approach. For example, many of our clients launch a team using 1-day sprints. This retro format is great when you only want to spend 15 minutes at the end of the day reflecting on the previous 24 hours.

It's also great for teams who work very closely together every day. They're going to have more shared data, so they don't need to do the observation and reflection stages as slowly and deliberately.

The Miro Board

You can find a view-only copy of the Miro board for this retrospective here:
https://miro.com/app/board/o9J_leCBUyU=/

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If you have a paid Miro account, you can import this backup of the board: Lightweight-ORID-Retrospective.rtbDownload

Check out the Miro help center for instructions on importing a board backup if you've never done that before: https://help.miro.com/hc/en-us/articles/360017572774-Board-Backup

Preparation

When you schedule this retrospective, you probably need either 30, 60, or 90 minutes:

- 30 minutes may be sufficient if you're reflecting on a period shorter than a week, especially if the team was working closely together
- Schedule at least 60 minutes if you are reflecting on a time frame that is a week or longer. You may not use all 60 minutes, but finishing early is better than running out of time.
- Schedule 90 minutes if you are reflecting on multiple weeks, or you suspect that there will be some tough conversations or difficult decisions to make. While 90 minutes might look long on the calendar, if the time is used well and you can get to some breakthrough improvements, it is well worth that extra time.

Pro tip: Schedule your meeting to start at 2, 7, 32, or 37 minutes after the hour. Most people are overscheduled these days, jumping from one meeting to another. Starting yours a little later than others, but at a precise time, is a great way to increase your chances of starting on-time with everybody in the meeting. This gives you more energy going into your retro.

Make a copy of the Lightweight ORID Retrospective Miro frame. Some teams choose to keep all their retros in the same Miro board. Others create a new board for each one.

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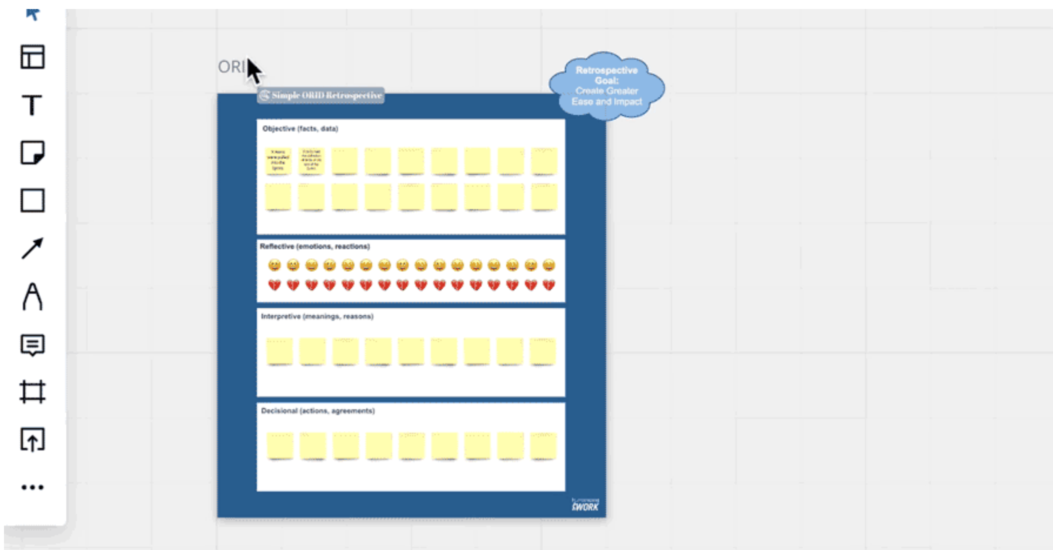

Pre-populate the Objective section of the retro frame with any data you have that might be useful for the team. For example, you might capture how many items were pulled into the sprint and how many were completed. Data doesn't have to be text on sticky notes. For example, you might add the team's burndown chart or cumulative flow diagram as part of the data.

Include data about outcomes of the previous retrospective and what happened with them since then.

Take care to ensure that any data you put on the board is clearly objective. Remove any judgmental language. Only add items in advance that you're certain everyone on the team would agree did indeed happen. Save anything debatable to offer during the course of the retrospective. If you offer the team what feels like biased data at the start of the meeting, you undermine your credibility as the facilitator.

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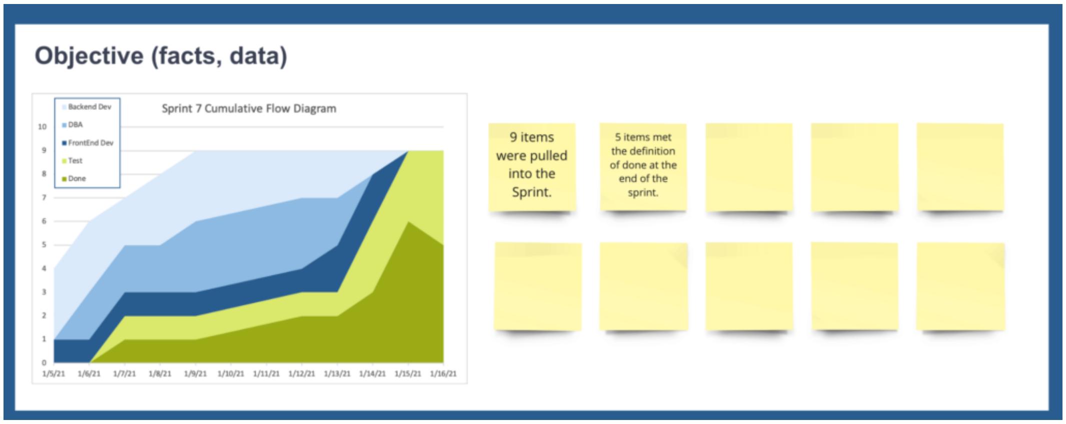
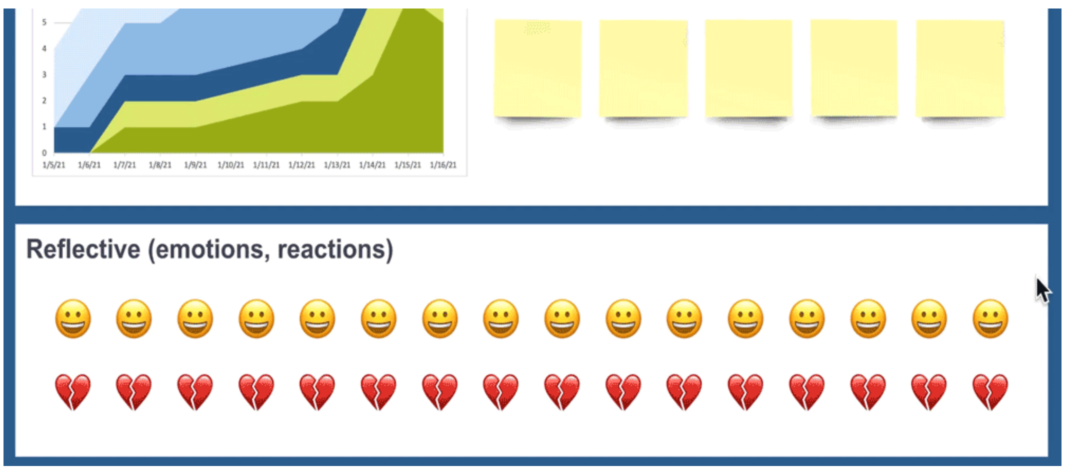


Objective section with some data pre-populated by the facilitator

Count the reflection icons (the smiley faces and broken hearts) to make sure there's one of each for each participant. Duplicate or remove icons if needed to give every participant one and only one of each.



Opening

This is a quick, focused retro format, so you'll want a high-energy opening to set the tone. On the template, you'll see we added a thought bubble that you can use here with our favorite retrospective framing. You might refer to this graphic and say:

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"As always, our goal for this retrospective is to arrive at some specific changes we can make that will create greater ease and impact in the next Sprint"

Observation

Use the "say it then write it" brainstorming approach here. Invite participants to add observations about what happened by saying out loud what they want to write and then capturing it on a sticky note. While the first participant is writing, invite another to share. Continue until the ideas slow down or begin to repeat. At that point ask, "What else happened that hasn't yet been captured in some form?"

Reflection

Next, say something like: "Now we want to capture your reactions to what happened. Look over the data on the board. Think back over how it felt during the sprint. Drag a smiley face icon onto the item you're most happy about or that you found most motivating. Drag a broken heart icon onto the item that's most frustrating or demotivating for you. You only get one of each icon, so look for the items that produced the strongest feelings for you."

Once the icons have landed, say something like: "Great! Now we have our shared objective data about what happened as well as data about our different feelings about what happened."

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Sample for how the board might look after the Reflection step

Interpretation

The interpretation phase can go in several different directions. Your intuition as the facilitator is important here.

In its simplest form, the interpretation phase of this retro can be the facilitator asking a question like, "What meaning or patterns do you see here?" and the group doing "say it then write it."

Alternatively, the facilitator can start there but make it more conversational, asking follow up questions, and then capturing themes on stickies as they emerge. This approach is good for converging towards a shared interpretation, but only if the group feels like the facilitator accurately captures the themes. Participants can become disengaged if they don't feel heard.

Another approach is to ask more tightly focused questions. For example,

> "What patterns do you see in the smileys? How about the broken hearts?"

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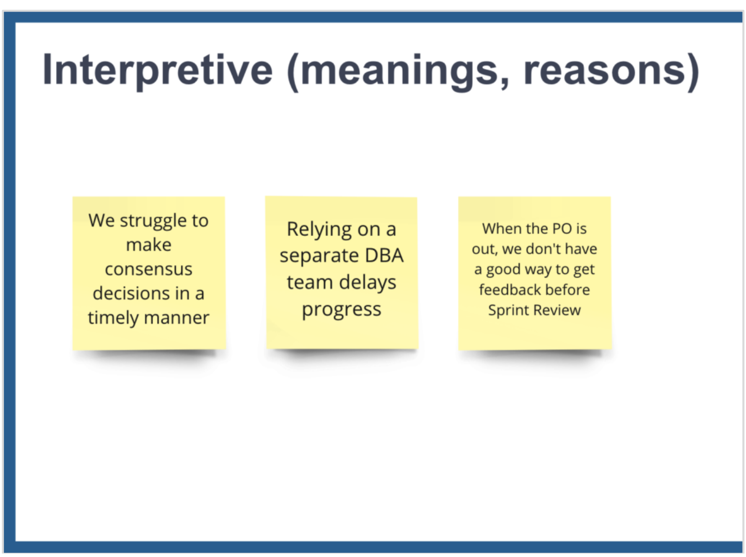
> "What seems to help us maximize impact and ease in our work? What seems to be getting in the way?"
>
> "What does this data tell us about us and our values?"
>
> "How are we different now than the last time we did a retrospective?"
>
> "How might an objective outsider interpret this data? What would they see that we're missing? What would they ask about?"

Don't limit yourself to these. But don't ask all these questions, either. Use your intuition to probe areas that seem important to the team.

Again, capture themes on stickies, taking care to ensure you're accurately reflecting what the group is saying. If you want to rephrase something someone said, ask permission and let them own the outcome.

Sometimes, this phase naturally converges to one or two core ideas. Other times, it diverges into many different themes. In the latter case, have the group dot vote on this question: "What's the most important theme for us to focus on in the next sprint?"



An example of a few themes emerging during the Interpretation step

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Decision

Invite proposals for experiments that could help with the selected theme. Capture them on sticky notes. If necessary, dot vote to find the one that seems most promising to the group.

Make sure the outcome gets captured in an actionable way. The decision should be visualized somewhere, or it's unlikely to actually change anything. Retrospective outcomes typically fit in one of four places.

1. Some items can be started and finished in a sprint (e.g., "Add static code analysis to our build process."). These should become a sprint backlog item in the next sprint.
2. Other items are more about how the team works together (e.g., "Focus on backlog items rather than on individual busyness in our Daily Scrum."). These go in a Working Agreement.
3. Still other items are about what the team means by *done* (e.g., "Update the user documentation incrementally instead of at the end of the release."). These get reflected in a change to the team's Definition of Done.
4. Finally, some items are tasks taken by individuals not on the development team (e.g., "Invite all appropriate stakeholders to our Sprint Reviews."). These might go on an individual's To-Do list.

Closing

Close strong, thanking the team for their participation.

Learn More

This facilitation guide is excerpted from the Humanizing Work online course, Facilitating Effective Retrospectives. Check it out if you're interested in additional content on facilitating retros.

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