

Scrum Master Checklist

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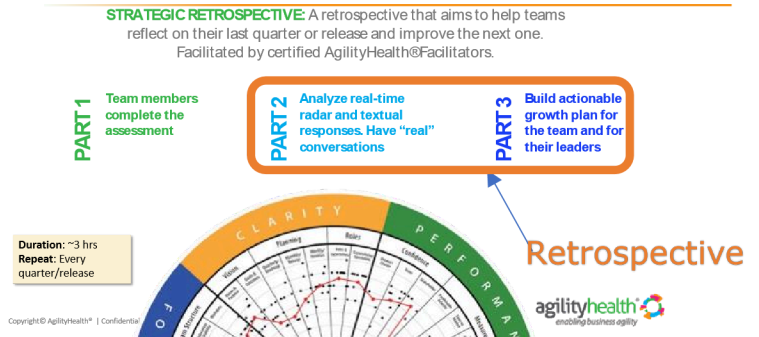
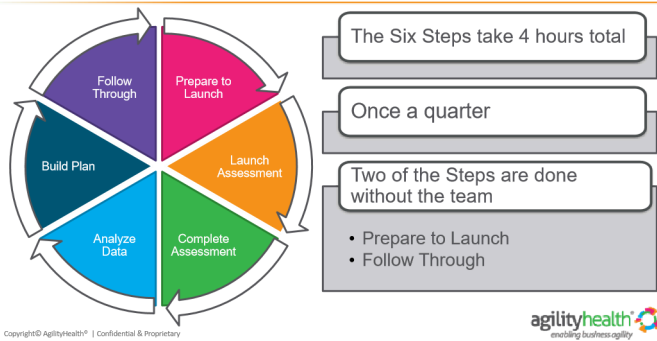
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Six Steps Process



STEP 1 Preparing for the Assessment

- **Meet with the AgilityHealth Facilitator: -**
 - [Confirm Team members](#) are correct
 - Ensure [Stakeholders are added](#)
 - Confirm [Team Tags](#) and [Team Member Tags](#) are correct
 - Team Tags to be selected: *[We recommend organizations list the ones that are important to them]*
 - Team Member Tags to be selected:
 - **Role** (Software Engineer, Business Analyst, Test (QA) Engineer, etc.)
 - **Participant Group – 3 to select** *[Please update with what’s true for your Org.]*

- Distributed or Collocated
- FTE (full time employee) or Contractor
- Location (etc.)
- Determine what approach you want to use for the Retrospective ([see approaches below](#))
- Determine when you'll [schedule the retrospective](#)
- If using approach 1, you'll want to schedule both meetings, ensuring there are no more than 5 days between taking the assessment (1hr) and the Retrospective (parts 2 & 3) (2hrs)
- Reference the email template for scheduling the Retrospective (see [Invitation to Retrospective](#))
- Ensure you are prepared to answer the quantitative questions ([excel spreadsheet](#))
- Look up the answers in Jira, if you don't have it rate it a 1 vs. selecting N/A. (if this is a baseline, you're not expected to have all the metrics, this will allow the team to see growth overtime.)

STEP 2 – [Complete the Assessment](#)

- Who should be attending this meeting? Who is part of the team?
 - Product Owner, Team Members, Scrum-master. ([See Appendix](#))
- If your team hasn't participated in an [Overview for Teams](#) session, ensure they have watched the video there is both a detailed one and a condensed 10min one.

STEP 3 – [Participate in Retrospective](#)

- **Assist the AgilityHealth Facilitator**
 - Help capture/refine growth items during the session
 - Bridge the relationship gap between the facilitator and the team
- **Deduplicate, Prioritize and Organize Growth Items**
 - Finish any Growth Items not completed during retrospective
 - Work with Facilitator/Coach to identify themes, prioritize, and create Organizational Growth Items
- **Follow Through on Team Growth Items**
 - Keep Team Growth Items Visible
 - Breakdown Growth Items during team backlog refinement
 - Work with Product Owner to prioritize improvement actions
 - Discuss Growth Items progress during Sprint Retrospectives
- Team members receive an email giving them access to the retrospective results after they complete their assessment.

Appendix

Retrospective Approaches

(Please use Approach #1 or #2 for the first time around)

The Three Approaches

Approach #1: Team takes the assessment together then meets 1-5 days later for the retrospective



Approach #2: Team takes the assessment and complete the retrospective in the same meeting



Approach #3: Team members take the assessment over 1-5 days individually and meet later for Retro



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Invitation to Retrospective for Team Members

Subject Line: AgilityHealth® Team Retrospectives Dear

Team Member:

As a reminder, your team has been selected to participate in an AgilityHealth® Retrospective. Please attend your retrospective session at [DATE] and [TIME]. The final output of this session is a Team Growth Plan with actionable items you want to achieve within the next quarter and Organizational Growth Items you want Leadership to address.

You will need to bring a laptop to participate in the Retrospective

Desired Outcomes:

- Analyze your radar results and engage in an open/honest conversation about your strengths and growth opportunities.
- Develop an actionable growth plan for your team for the next quarter/release.
- Let Leadership know where they can help you.
- Have FUN!

Post Retrospective:

- We'll ask for your feedback on the session.
- We'll share your Organizational Growth Items with Leadership so they can take action.
- Help pull any improvements identified into your next retrospective. Thank you for participating in the AgilityHealth® Retrospectives!

Pre-Assessment Email to Stakeholders about Assessment

Subject Line: AgilityHealth® Assessment - Your input is needed!

Hello!

As you may know, we are launching AgilityHealth® assessments for our teams. You have been identified as a Stakeholder for a team or teams, which means you will receive an email or emails on [DATE] with a link to a short assessment on how you think the team is performing.

The assessment is very short and typically takes no longer than 5 minutes. **Please complete each assessment you receive by [DATE]**, as this will allow the teams to review the results during their retrospective sessions.

Your input is anonymous and is a critical part to the overall assessment results and team growth plan. Please provide constructive feedback as we are excited to use the results to help the team and program grow.

More information about the platform can be found at www.AgilityHealthRadar.com.

Please connect with any questions or comments!

Who Participates in the TeamHealth Retrospective

Who's Participates In A TeamHealth Retro

- Team Members
 - Core members of team [SM, PO and Development Team]
 - Includes contractors who are members of your team
 - Does NOT include anyone who does not deliver as part of your team
- Stakeholders
 - Do not attend the strategic retro session
 - Stakeholders are people who have a direct stake in the health and delivery of teams but are not part of the actual team [Product Mgmt., Team Leads, etc.]
 - Stakeholders receive a 2 question survey prior to the strategic retro and answers the following ?'s:
 - What is your confidence in the team?
 - Using a scale of 1 to 10; how likely are you to recommend working with this team to others?

How to add Team Members?

Teams Dashboard | Admin Dashboard | Enterprise Dashboard | Growth Items | Assessment Dashboard | Facilitator Dashboard

Here are your teams. Select one to explore that team's health.

Team: Spirit

Avatar	Team Name	Work Type	Number of Team Assessments	Last Date of Assessment	Team Tags	Commands
	Spirit	Software Delivery	1	3/1/2023	179050_20230100490, Frank Masucci, https://ce0b-b1b0bucket.net.s3.amazonaws.com/INDIGITGTP/theses/ff_mgmt/tp_curation/br... INDIGIT_PCA Management & Regulatory Reporting - Global, Scrum, Software Delivery, SDP, Shanghai	

1 - 1 of 1 items

Team Profile | **Team Members** | Stakeholders | Metrics

Edit Spirit

Edit your awesome team here. Make it fun to have a little fun with your team photo. Team tags will help you filter later.

Update Team Information

Edit Team Members

Add new team members to the table below or edit existing ones.

Update Team Profile

Team Name: Spirit

Work Type: Software Delivery

Preferred Language: Select One

Methodology: Scrum

Avatar:

Reset Photo

Avatar	First Name	Last Name	Email	Roles	Particip...	Team
	Moyou	Qu	moyou.qiu@noaccess.citi...	Software Engineer	Distribut...	Shanghai

Buttons: Add Team Member, Upload Team Members

How to add Stakeholders?

agilityhealth

Teams Dashboard | Admin Dashboard | Enterprise Dashboard | Growth Items | Assessment Dashboard | Facilitator Dashboard

Here are your teams. Select one to explore that team's health.

Team: Trinity

Avatar	Team Name	Work Type	Number of Team Assessments	Last Date of Assessment	Team Tags	Commands
	Trinity	Software Delivery			179076_20230100423, Inqury Framework, Nepal Peery, PCA Management & Regulatory Reporting - Global, Scrum, Software Delivery	

1 - 1 of 1 items

Company Dashboard / OR / Trinity / Edit Profile

Team Profile | **Team Members** | Stakeholders | Metrics

Edit Stakeholders

Time to add some stakeholders.

Update Team Information

Team Name: Trinity

Work Type: Software Delivery

Preferred Language: Select One

Methodology: Scrum

External Member: Trinity

Department Group

Use External:

App Member Date

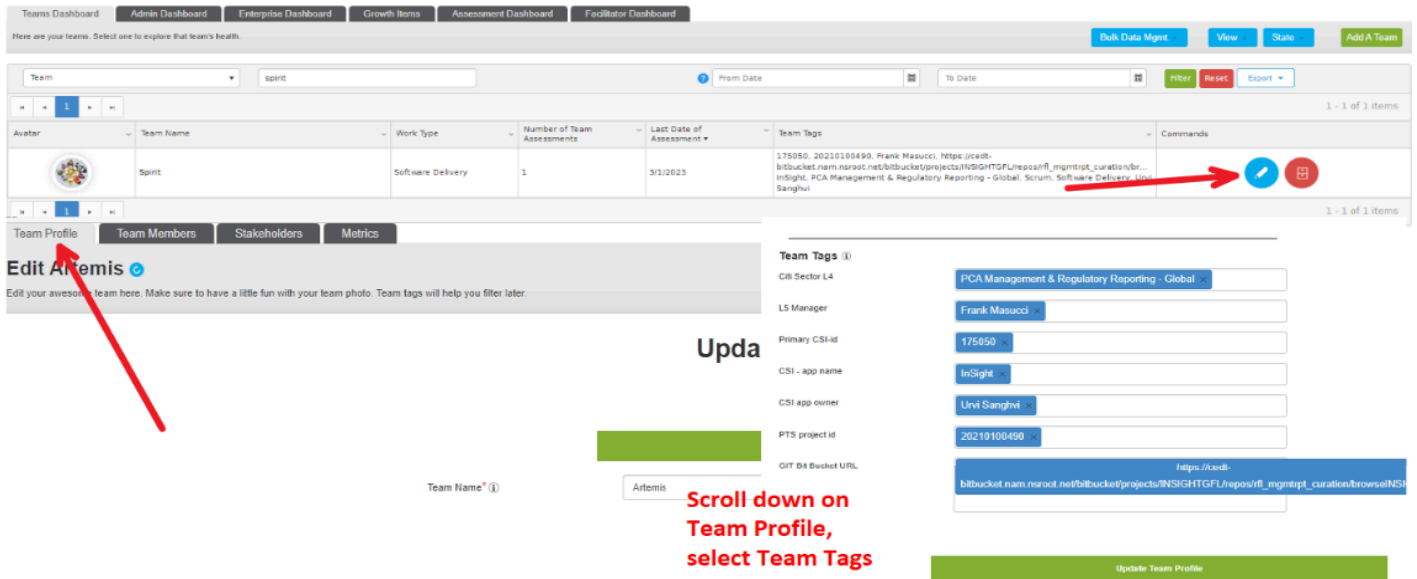
Edit Your Stakeholders Below

Add new stakeholders below or edit existing ones.

Buttons: Add Stakeholder, Upload Stakeholders, Add From Directory

Avatar	First Name	Last Name	Email	Roles
There are no stakeholders assigned to this team yet.				

How to Update Team Tags?



The screenshot shows the 'Edit Artemis' team profile page. A red arrow points to the 'Team Tags' tab. Another red arrow points to the 'Team Tags' update form, which includes fields for CUI Sector L4, L5 Manager, Primary CSI-id, CSI - app name, CSI app owner, PTS project id, and GIT Bit Bucket URL. A green 'Update Team Profile' button is at the bottom.

Update Team Tags

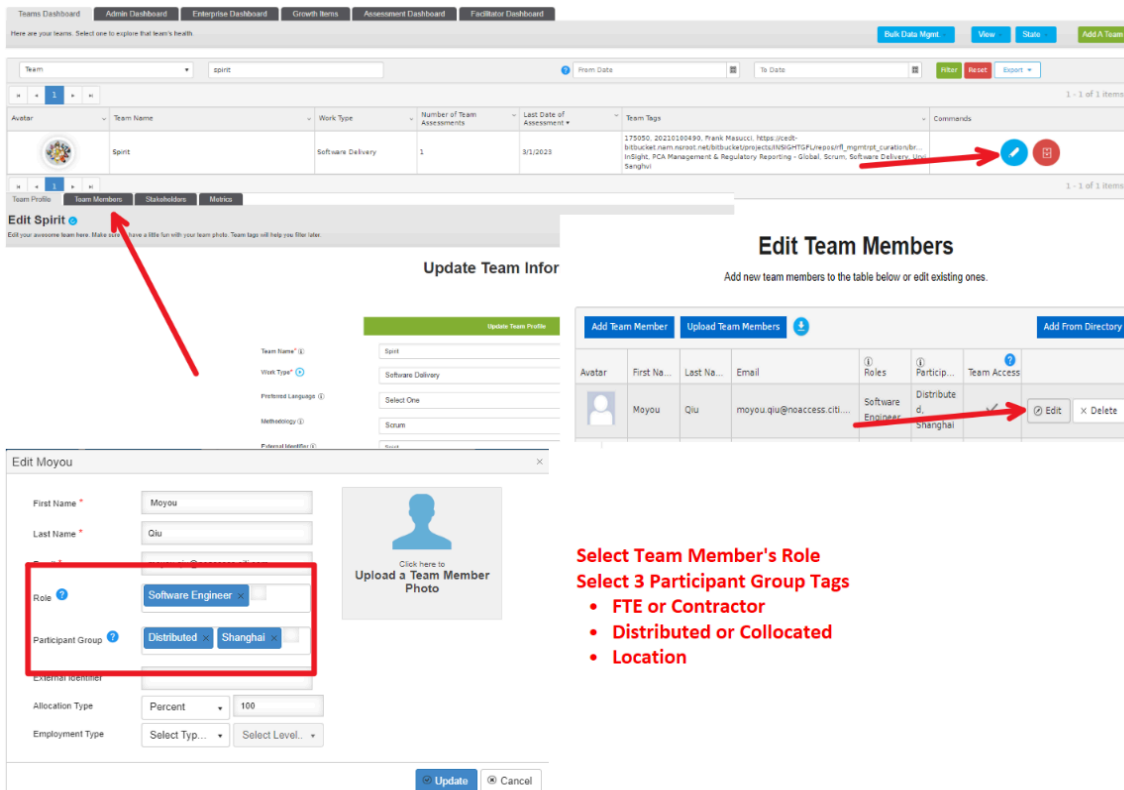
- CUI Sector L4: PCA Management & Regulatory Reporting - Global
- L5 Manager: Frank Masucci
- Primary CSI-id: 175050
- CSI - app name: InSight
- CSI app owner: Unvi Sanghui
- PTS project id: 20219100490
- GIT Bit Bucket URL: https://asci-bbbucket.nam.noroot.net/bitbucket/projects/INSIGHTFL/repou/ff_mgmtpt_curation/browse/INS

Update Team Profile

Upda

Scroll down on Team Profile, select Team Tags

How to Update Team Member Tags?



The screenshot shows the 'Edit Spirit' team profile page. A red arrow points to the 'Team Members' tab. Another red arrow points to the 'Edit Team Members' form, which includes a table of team members and an 'Edit' button. A third red arrow points to the 'Edit Moyou' form, which includes fields for First Name, Last Name, Role, Participant Group, External Identifier, Allocation Type, and Employment Type. A green 'Update' button is at the bottom.

Edit Team Members

Add new team members to the table below or edit existing ones.

Avatar	First Na...	Last Na...	Email	Roles	Particip...	Team Access	
	Moyou	Qiu	moyou.qiu@noaccess.citi...	Software Engineer	Distribute d	Shanghai	Edit Delete

Edit Moyou

- First Name: Moyou
- Last Name: Qiu
- Role: Software Engineer
- Participant Group: Distributed, Shanghai
- External Identifier: [Blank]
- Allocation Type: Percent, 100
- Employment Type: Select Typ..., Select Level...

Update [Cancel](#)

Select Team Member's Role
Select 3 Participant Group Tags

- FTE or Contractor
- Distributed or Collocated
- Location

Reminder Email for Retrospective to Team Members

Subject Line: DONT FORGET - AgilityHealth® Team Retrospective Reminder

Dear Team Member:

DON'T FORGET that your team has been selected to participate in an AgilityHealth® Retrospective.

If you are the ScrumMaster or the Product Owner of the team and your team is taking the TeamHealth Assessment, you may be asked to provide answers to the quantitative questions during to the retrospective. The TeamHealth quantitative questions can be found [here](#). [pls link to TeamHealth 4.0 pdf]

We encourage you to view the [Overview for Teams](#) video beforehand, which focuses on:

- Overview of AgilityHealth
- The assessment and retrospective process
- Taking the AgilityHealth Assessment
- Analyzing your team results
- Creating your Team Growth Plan
- The post retrospective process
- Managing you Team Growth Items
- How Leaders will manager Organizational Growth Items

Thank you for participating in the AgilityHealth® Retrospectives!

Scrum-Master Roles & Responsibilities

ScrumMaster



Responsible for facilitating the Scrum process and ensuring the team is delivering value

- Process facilitator - owns process that creates success
- Leads and guides the team - Servant leader
- Protects the team from disturbances
- Track metrics and communicates overall progress with stakeholders
- Manages team growth plan
- Coaches individual team members on expectation of their role
- Facilitate Sprint planning, execution and reviewing activities with the team
- Assesses overall team health and maturity & keeps the pulse of the team
- Removes impediments & manages dependencies across teams
- Communicates information about team progress to stakeholders
- Radiates information to the team to help them make decisions
- Coordinates all external team needs (Team of Team Planning, Retros, etc.)
- Helps build self-organizing teams and helps the team adapt and inspect their process
- Responsible for engaging necessary individuals outside the team

Links to Important Videos

- [TeamHealth Overview](#) Video or the [Above the Line Video](#)
- If you haven't attended the [scrum-master training](#), please follow this link to watch the training.
- Link to the [Overview for Teams Recording](#) (45mins)
- Condensed Overview for Teams [short Overview for Teams](#) (10mins)
- Link to the [Overview for Leaders Recording](#) (30mins)