The Pragmatic Programmers

Creating Great Teams

Second Edition

How Self-Selection Lets People Excel

Sandy Mamoli and David Mole

Foreword by Esther Derby

edited by Katharine Dvorak

Early Praise for *Creating Great Teams, Second Edition*

Sandy and David's work is inspirational. Through numerous case studies, and appropriately detailed guidance, they provide a flexible and powerful means for those closest to the work to be able to do their best work!

➤ **Andy Cleff**
Chief Change Catalyst

Creating Great Teams takes the wild notion that humans, when left to choose their own teams, might actually know better than managers—and turns it into a practical guide for leaders ready to let go of the reins. With a delightful mix of theory, real-world case studies, and hands-on advice, this book equips you to foster a workspace where autonomy meets productivity and—dare I say it?—everyone wins.

➤ **Jurgen Appelo**
Author of *Managing for Happiness and Management 3.0*

Sandy and David have cracked the code for building great teams. I know from first-hand experience that their self-selection approach—outlined in this book—is practical, effective, and surprisingly easy to implement. Not only did we get happier teams, but we unquestionably developed a more productive workforce.

➤ **Staffan Nöteberg**
Author of *Guiding Star OKRs: A New Approach to Setting and Achieving Goals*

Peter Drucker noted, "The purpose of an organization is to enable ordinary people to do extraordinary things." I can't think of a better way to enable ordinary people to do extraordinary things than to trust them to self-select the teams they want to work on. Sandy and David have developed an amazing approach—a rather pragmatic approach—they describe as self-selection, "which embodies the principle of trusting people to solve complex problems and empowering them to organize a way that works best for both themselves and their organization." Brilliant! What an amazing approach to creating both clarity and alignment, which are essential to driving sustained performance, encouraging innovation, and delivering value to customers. This is an essential read for all people who want to excel and want to help others excel.

➤ **Heidi Musser**
Board Director, Board Advisor, Consultant, C-level Executive

Creating Great Teams is a master class in the future of team design—teams that thrive on autonomy and ownership. I have been recommending and referencing the original book for many years, and this second edition takes it to new heights. Sandy and David have weaved together fresh insights, compelling case studies, and practical strategies that are more relevant than ever. This book is a must-read for anyone looking to create high-performing, deeply engaged teams that thrive on ownership and autonomy.

➤ **Evan Leybourn**
Cofounder, Business Agility Institute

Creating Great Teams, Second Edition

How Self-Selection Lets People Excel

Sandy Mamoli
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ISBN-13: 979-8-88865-133-9
Encoded using recycled binary digits.
Book version: P1.0—March 2025

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Acknowledgments

Many people have contributed to this book, and we'd like to say a heartfelt thank you to all of them!

First, we are thrilled to be working with our editor, Katharine Dvorak, once again for the second edition of this book. Her invaluable feedback, sharp editing, and sheer brain power have made this process smoother and more insightful than ever.

A huge thank you to all the people and companies who have embraced self-selection, shared their stories with us, and trusted us to tell them. Your openness and willingness to experiment have enriched this book with real-world experiences.

Thank you also to Susannah Davidson, Dave Thomas, and Andy Hunt at The Pragmatic Bookshelf and all of our wonderful reviewers: Andy Cleff, Brenda Leeuwenberg, Andrea Paramithiotti, Esther Schmit, Rachel Slattery, and Paulius Tuzikas. Your challenging questions, attention to detail, and thoughtful feedback have helped make this book much stronger.

And thank you so much to Esther Derby for her wonderful foreword and inspiration for the second edition!

Finally, a special thank you to our ever-faithful dogs, Sam and Luca, who have provided constant companionship and stress relief during the writing process. Their presence has been a reminder to take breaks and enjoy the little things.

Foreword

When *Creating Great Teams: How Self-Selection Lets People Excel, First Edition* came out in 2015, it probably struck some people as a radical idea: let people choose their own teams? That's a manager's job. Certainly, chaos will ensue!

But lots of people have tried it over the last decade, using the advice in the first edition of Sandy and David's book. And it has worked. Chaos did not ensue. The worst fears didn't materialize. Even when some work wasn't terribly exciting, people recognized that it was necessary and stepped in to do it.

Team self-selection has worked because the people closest to the work often know best who has the right skills and the right relationship chemistry. It has worked because people are more committed to something they've chosen over something imposed by someone else. It has worked because it gives people agency: people choose what they want to work on and who they want to work with.

Social scientists have been pointing out for years that these factors contribute to effective work. Not everyone reads the research. Even if they did, it might not get through. Business schools and management trainings have been telling people something quite different—that managers need to control things. It can be exceedingly difficult for any human to go against what they've been taught to believe about the way the world works. It's hard for any human to give up control (or the illusion of it).

Scientists have also been telling us this for years. Neuroscience suggests our minds are wired to protect and defend our mental models. Without consciously trying to, we favor data that confirms our view of the world and skim over disconfirming data. Psychologists know that wanting to be in control is a deeply rooted need. Being in control guards against a sense of unpredictability. Being in control helps people feel needed.

It's a lot to overcome.

But if we look at the manager's job a little differently, the leap might be easier. What if we say a manager's job is to create the conditions for great teamwork to emerge? This idea may seem radical too. In reality, managers probably have more control over the environment than the people in it. And environments shape behavior.

Yes, when you give up control and focus on the environment, the results may be somewhat unpredictable. But remember, the unpredicted is not always horrid. Sometimes unpredicted results are astonishing and wonderful—better than one could have imagined. I've seen this happen hundreds of times.

David and Sandy will walk you through what it takes to create the environment for team self-selection. From laying the groundwork, defining which teams need to exist to do what work, and establishing rules and constraints, to orchestrating the event—their experience will help you create the conditions for a successful event and successful teams.

Team self-selection demands discipline—to stay out of the need to control and fix things. This is hard, because most managers take pride in fixing things. This does not mean managers aren't needed. Far from it! Managers need to nurture, support, and guide teams as they grow into their new roles. They need to continue to attend to the conditions and the people on the teams.

We don't have to extrapolate from social science research anymore. The evidence is stacking up in our own field that the process described in this book contributes to an environment where collaboration, creativity, and engagement thrive.

Take the leap! Sandy and David will guide you every step of the way.

Esther Derby

Coauthor of *Agile Retrospectives: A Practical Guide for Catalyzing Team Learning and Improvement, Second Edition,* and *Behind Closed Doors: Secrets of Great Management*
Author of *Seven Rules for Positive Productive Change, Micro Shifts, Macro Results*
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Preface

Since publication of the first edition of this book in 2015, self-selection has transitioned from a radical idea to a proven practice. We have seen that our core premise—that individuals thrive when they can choose their teams rather than being shuffled by management—has resonated with organizations all over the world.

Building on a decade of new experiences, this updated edition builds on the original groundbreaking concepts with fresh insights, wide-ranging case studies, and detailed strategies for navigating the complexities of work and forming teams. From small startups to global enterprises, the principles of self-selection have proven to be both adaptable and effective. We have enhanced the first edition with lessons learned from real-world applications of self-selection. We address the movement to remote and hybrid ways of working, the nuances of ensuring a clear and safe process, and the pitfalls of misinterpreting self-selection.

Through a blend of practical advice and real-world examples, this book will equip you with everything you need to implement self-selecting teams in your organization. From the initial groundwork and planning phases to carrying out self-selection events and the crucial steps that follow, you'll learn how to create an environment where people choose their teams and choose their work, creating a strong sense of ownership, autonomy, and satisfaction.

This book is not about *how* you should structure your teams, although we will talk about how the idea sits across concepts like dynamic reteaming and team topologies. Instead, it addresses the best possible *way* of designing those teams and getting the right people into those teams—through self-selection.

Who Should Read This Book?

Self-selection isn't just for technology teams. If you work in an industry that benefits from people working in small, cross-functional teams, then self-selection could be for you.

If you are a CEO, CTO, delivery manager, VP of engineering, head of marketing, or any other kind of leader looking to structure your department into small teams, this is the fastest and safest way to do so. You'll learn how to prepare for and organize a self-selection event, how to convince your colleagues that it's a good idea in the first place, and how to communicate with your participants to make sure everyone is on board and ready.

For those in human resources, people management, or coaching roles, this is your playbook for creating a culture rich in autonomy, ownership, and belonging. You'll discover how self-selection can positively impact your culture and how to nurture an environment that champions autonomy.

If you're on the ground as a developer, quality assurance specialist, UX designer, product manager, product owner, or business analyst, you'll get an insider's view of what it's like to be part of a self-selection process. Plus, you'll find tips on convincing your colleagues or boss to embrace this approach.

And for the facilitators among us, get ready for a comprehensive guide on planning, executing, and solidifying self-selection in a way that's both effective and psychologically safe.

Whether you've tried self-selection in your organization or you want to learn about it for the first time, this book will provide you with a clear method and a deep understanding of the thinking and reasoning that sits behind the approach along with examples and case studies of this being done in a remote or hybrid environment.

How This Book Is Organized

As we navigate through the chapters, we introduce you to the mechanics of self-selection, from laying the groundwork to conducting the event and beyond. Each section builds on the last, weaving together theory, practice, and real-world insights to guide you in implementing self-selection within your organization.

Part I—Understanding the Core Concept

In Part I, you'll discover the critical impact of team design on effectiveness, emphasizing the shift toward dynamic teams in today's workplace. We delve into how self-selection is pivotal in fostering flexible team structures, supporting seamless team transitions, and scaling effectively.

You'll see why managerial selection falls short and how self-selection's proven track record offers a compelling alternative. Through an engaging case study, you'll get an insider's view on the emergence of self-selection,

its solutions to common team-formation issues, and the tangible experience it provides to all participants. This section lays the foundation for appreciating self-selection's role in modern team design and team dynamics.

Part II—Mastering the Self-Selection Method

Part II guides you through preparing and executing a successful self-selection event. You'll be equipped with practical ideas, essential tools, expert advice, and comprehensive checklists to ensure thorough preparation. Our goal is to bolster your confidence in navigating this process smoothly, avoiding common pitfalls and oversights while setting you up for success.

You'll master the art of organizing a self-selection event, from establishing clear rules and constraints to devising a strategic facilitation plan and assembling all necessary materials. This part arms you with a proven tool kit for in-person, remote, or hybrid events, empowering you to confidently plan and conduct a self-selection tailor-made for your organization.

Part III—Learning from a Decade of Self-Selection

In Part III, you'll learn how to adapt self-selection to your context. We'll guide you through the changes and tweaks you can make whether your teams are uniquely set up or following a heavily structured framework like SAFe.

Through real-world case studies, we'll explore the different approaches that have been used with self-selection across diverse organizational contexts—whether expanding, downsizing, large or small, agile, or otherwise. These insights will show you the universal applicability and benefits of self-selection, including how to maintain momentum and foster a sustainable self-selection culture.

Online Resources

This book has a companion web page on the publisher's website at pragprog.com.[1] There you'll find a forum for discussion as well as a place to report any errors you may encounter. You'll also find a whole host of additional tools, templates, case studies, and more at our Nomad8 website in the self-selection section.[2]

1. https://www.pragprog.com/titles/mmteams2/creating-great-teams
2. https://www.nomad8.com/team-self-selection

Embrace Self-Selection

This book describes a process that works—whether you're building teams from scratch, aiming to enhance the way you are currently organized, or gearing up for a major reshuffle. How can you be sure that your teams are the best possible mix of talent and preferences? There's only one reliable method: ask your people who they want to work with and what they want to work on. Let them decide.

By embracing self-selection, you're not just rearranging people; you're unlocking the full potential of your organization. Whether you're kick-starting a new culture or revitalizing a stagnant environment, self-selection is your ticket to a more energized and productive workplace.

So dive in! Immerse yourself in the world of self-selection, learn from some of the best organizations in the world, and embrace the idea of moving the choice of team to the right level.

Part I

Understanding the Core Concept

CHAPTER 1

Self-Selection and the Art of Dynamic Team Design

In a world where change is the only constant—be it rapid growth, downsizing, shifts in strategy, or adapting to remote and hybrid work—there's always room to explore fresh approaches to organization and teamwork. One promising path is fostering a culture of ownership and autonomy by assembling small, dynamic, cross-functional teams. The key to achieving this? Self-selection.

When we initially defined and trialed our ideas a decade ago, self-selection seemed radical, but now it's proven to be an effective way to design and create teams. Picture this: engineers, quality assurance, business analysts, designers, UX professionals, and product owners all coming together to figure out the best team structures on their own—taking the managers out of the equation and trusting your people. The results? Nothing short of incredible.

In current times, where remote and hybrid work are the norm and disengagement is a lurking threat, cultivating a sense of ownership and autonomy is more crucial than ever. Self-selection stands out as the perfect strategy to drive engagement. It empowers everyone to choose their work and their teammates, thereby creating vibrant, committed teams.

What Is Self-Selection?

Self-selection is a facilitated process of letting people self-organize into small, cross-functional teams. Think of it as a guided journey toward dynamic teaming and reteaming. It's founded on the belief that people are at their happiest and most productive if they can choose what they work on and who they work with.

It's not just about self-organizing teams—though those are great! *Self-organizing teams* are groups of motivated individuals who work together toward a shared goal and have the ability and authority to take decisions and readily adapt to changing demands. This process is about setting up these self-organizing teams through self-selection. Another name for what we are suggesting in this book? *Self-designed teams*.

A Decade of Self-Selection

Back in 2013, we had our first attempt at self-selection at a company called Trade Me, which at the time was New Zealand's biggest ecommerce company. Over 150 people from three cities came together to try out our newly minted self-selection process. It proved to be a huge success, and the story made its way into the first edition of this book,[1] inspiring companies far and wide to give self-selection a shot themselves.

Fast-forward a decade and self-selection has proven its merits in all kinds of organizational settings. Whether implemented at a tight-knit startup or at a corporate giant, the approach has worked outstandingly well. We've seen it in action both in person and remotely, across different cities and countries.

It's not just about location or company size though. Self-selection has found its place in all sorts of business landscapes—from companies growing or shrinking to those finding their footing after a big reorganization or change of strategy.

We've now seen self-selection work in a variety of contexts and frameworks, such as SAFe,[2] LeSS,[3] or a company's own framework or method. Organizations have successfully used self-selection to create product teams, feature teams, component teams, or any other type of team that fits their needs. And it has been successfully used for everything from dynamic teams that last for days or weeks to teams that are more stable and static with just a few members swapping in and out every few months.

The global appeal of self-selection is evident in its widespread adoption across various industries and regions. Today, our strategies and insights have inspired countless companies across the globe to embrace self-selection. We've heard stories of self-selection events from Australia, Denmark, Germany, New Zealand, South Africa, Sweden, Taiwan, the Netherlands, the United Kingdom, and the United States.

1. https://www.pragprog.com/titles/mmteams/creating-great-teams
2. https://scaledagileframework.com
3. https://less.works/less/framework

And people love it.

After every self-selection event, we ask people how they feel about their new teams. Time after time, the feedback is overwhelmingly positive. It turns out that when you let people choose their own teams, they become happier and more committed to team success.

What's the big takeaway from more than a decade of self-selection? Whether your goal is to tackle the known or explore the unknown, letting people pick their teams is the way to go. It's not just a theory; it's a practice that's been tried, tested, and proven to bring out the best in people. It's about tapping into what people naturally hope for in a team: collaboration, autonomy, and a little bit of magic.

Over the past decade, self-selection has not only proven its worth but has also laid the groundwork for something powerful: the art of deliberate and thoughtful team design. By allowing individuals to choose their teams, we tap into their intrinsic motivation and align personal strengths with team goals. So let's start by diving deeper into the art and science of team design and how self-selection can be the optimal foundation.

The Art of Team Design

Mention the word "team" and it's likely images of sports teams spring to mind: footballers strategizing in a huddle or a volleyball team setting up a match-winning spike. In the realm of sports, outstanding teams are made up of individuals who have learned to leverage each other's strengths and compensate for weaknesses, operating as an integrated unit.

This concept of teamwork is mirrored in the world of work—nowhere more so than in technology teams, where developers, designers, analysts, product managers, and others work together much like a sports team. Each member possesses unique skills and perspectives crucial for successful delivery. Just as a volleyball team relies on every player to set up and execute a play, a technology team depends on the same connection between team members.

The success of any initiative, much like a match, depends on the collaboration of diverse roles. The team's collective achievement in developing functional and impactful technology is a testament to the synergy at play, where the whole significantly surpasses the sum of its individual parts.

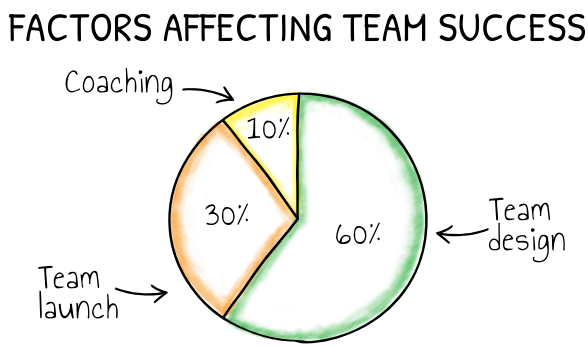
Today's Work Demands Dynamic Teams

In today's ever-changing world, an organization's success hinges on its ability to stay ahead of the curve, foreseeing and reacting to various shifts in its surroundings. Whether it's a new trend in consumer behavior, a shift in technology, or a change in the economic landscape, the ability to quickly recognize and adapt to these changes is what keeps an organization relevant and competitive. It's about being agile and resilient, transforming challenges into opportunities, and continually evolving to meet the demands of the environment.

The ability of teams to work well together and learn from each other and their surroundings is what determines whether an organization thrives or falters. It's not just about individual expertise; it's about how effectively a team can come together, share insights, adapt to new information, and tackle challenges as a unit. This collective ability to learn and grow is the cornerstone of success in a world where adaptability is key.

The Science Behind Team Design

When we started looking into the science, we found research suggesting that team design can be the most important factor in overall team performance. Professor J. Richard Hackman from Harvard University concluded that team design accounts for 60 percent of the variation in team effectiveness. Thirty percent can be attributed to the way the team is launched, and 10 percent to leader coaching once the team is under way, as shown in the following pie chart.[4] Hackman emphasizes that well-designed teams ("real teams," as he refers to them) are marked by distinct characteristics: explicit objectives, tasks tailored for collaborative efforts, team members possessing suitable skills and experiences, sufficient resources, and the availability of coaching and support.



4. https://estherderby.com/miss-the-start-miss-the-end

This is certainly consistent with our own observations. We've watched star-studded teams grossly underperform where the mix of personalities wasn't right. We've seen teams fail because the star players weren't able to see past their personal preferences and were more focused on their own performance than the team's achievements.

Effective team design hinges on finding the right combination of skills and personalities. However, the landscape of team dynamics is never static; it's constantly evolving. Understanding this evolution is crucial for applying self-selection and team design in a way that accommodates both the seemingly conflicting needs for team stability and the inevitability of change. This brings us to an important consideration: how have views on team stability shifted over time, and what does this mean for modern teams?

Shifting Views on Stability

In the realm of team performance, research (including that of J. Richard Hackman) has consistently highlighted the advantages of stable teams in most contexts. Stability in this sense refers to teams maintaining a core group with minimal, yet thoughtful, changes in membership over a period as long as one to two years. We have long been told that stability is crucial for enabling teams to reach their full potential.

One reason for greater productivity in stable teams is that they don't have to repeatedly go through stages of team building over and over again. In contrast, teams that are constantly changing, typical in environments where temporary project teams are assembled and then disbanded, may struggle to progress beyond the initial stages of team forming. Such teams risk remaining a collection of individuals, no matter how talented they might be. This constant state of flux is detrimental to performance, as it prevents teams from developing the deep relationships necessary for true synergy.

However, the concept of team stability has evolved significantly over time. Previously, the belief was that stable teams were the only effective model. This view has shifted, acknowledging the dynamic nature of modern organizational environments. Today's organizations face constant changes; they expand and contract, welcome new members, and bid farewell to others. So, maintaining stable teams can often be a luxury rather than a norm.

Furthermore, the desirability of stable teams might not be as clear-cut as once thought. Teams can become stale and see a decline in performance after years without new impulses, such as structural changes and fresh team

members. This observation is mirrored in elite sports teams, which, despite maintaining a core group of players, routinely undergo changes. These teams add or remove players each season and make substitutions throughout, ensuring they remain dynamic and avoid stagnation.

This shift in perspective on team stability underscores the importance of adaptability within team design. As organizations navigate the delicate balance between stability and dynamism, self-selection offers a powerful tool for building teams that can evolve while maintaining their core strengths. By allowing teams to periodically refresh their composition, we can harness the benefits of stability without falling into the trap of stagnation, ensuring that our teams remain both resilient and responsive to change.

Teaming and Reteaming

The challenge, then, is to find the optimal balance for your organization. This concept is eloquently summarized by Heidi Helfand in her book *Dynamic Reteaming—The Art and Wisdom of Changing Teams [Hel20]*, where she asserts, "Since we're re-teaming all the time, shouldn't we get good at it?" This statement captures the essence of the contemporary organizational challenge: mastering the art of fluid team dynamics while maintaining the core elements that support team success.

Fluid teams require people to be proficient in the skill of *teaming*. Teaming, as Amy Edmondson describes in *Teaming: How Organizations Learn, Innovate, and Compete in the Knowledge Economy [Edm12]*, encompasses a range of activities that include communicating clearly and honestly, taking risks, confronting failure, and crossing boundaries. It transcends the limitations and rigidity of traditional team structures and is an active, ongoing process rather than a static state.

Dynamic reteaming is an extension of this concept, embracing the inevitability of change within teams. It acknowledges the various forms this change can take, from the simple addition or removal of team members to more significant shuffling. Dynamic reteaming is the process where teams undergo changes, ranging from simple alterations like adding or removing a team member to more radical transformations such as merging members from various teams to create a new one. This concept acknowledges the fluidity and ever-changing nature of modern team structures, emphasizing the need for adaptability and resilience in the face of organizational shifts.

Self-Selection vs. Managerial Selection

At the heart of teaming or reteaming lies the fundamental task of designing the team. Traditionally, the formation of teams, and in particular the choice of who goes in each team, has depended solely on managerial judgment. This approach varies significantly in its execution ranging from informal methods, such as the Five You's Method aptly named by agile coach Don Gray ("You, you, you, you, and you. You're now a team."),[5] to more formalized processes including extensive job analysis, personality profiles, and meticulous selection criteria.

However, regardless of the rigor applied in these processes and despite managers' best intentions, the actual melding of a group into a cohesive and effective team is challenging, and the outcomes are varied at best. While a few teams manage to excel, many trudge along, and most fail to exhibit the level of responsibility and engagement that managers anticipate.

As Esther Derby discussed in the foreword to the first edition, fundamentally, two factors determine whether a group will forge itself into a team:

- *The desire to address the problem:* Do these people want to work on this problem?
- *The willingness to collaborate:* Do these people want to work with each other?

Neither a computer program nor a manager can answer these questions. Only the people who will do the work really know.

In terms of designing teams, two main methods are open to organizations:

- *Managerial selection:* Managers decide on which team a person should work.
- *Self-selection:* People decide for themselves on which team they want to work.

The table on page 10 outlines the main differences between self-selection and managerial selection.

5. https://www.agileconnection.com/article/no-group-team-day-one

	Managerial Selection	Self-Selection
Employee Engagement	Limited, employees have little input	High, employees choose their teams
Team Fit and Alignment	Mismatches with individuals not where they want to be	Better alignment of skills and interests with team/individual needs
Transparency	Opaque, with decisions made behind closed doors	Highly transparent and visible
Empowerment	Limited, with top-down decisions	High, with autonomy in team choices
Speed and Efficiency	Slower due to multiple steps and tweaks required	Faster, with streamlined team formation
Morale	Lower or unchanged morale	Improved morale
Management Control	High, with managers controlling the process	Lower, with decentralized decision-making
Innovation and Creativity	Stifled by top-down decision-making	Encourages innovation and creativity

Managerial Selection Breaks When Organizations Grow

Managerial selection is the traditional way of allocating people to teams. Good managers design teams based on their knowledge of employees' skills and personalities and who they think would work best with whom. Choices are made with the very best intention.

In a small company this often works well, a good manager is aware of relationships between people and knows the skills, personalities, and preferences of each of them. Often they come up with team compositions that are mostly right, and it's a quick way to get team selection done.

This model breaks down when a company grows, shrinks, or goes through a period of significant change, such as during a restructure or when adapting to changing market conditions. Managers might still know their direct reports' skills and personalities, but it becomes increasingly difficult to understand the intricacies of relationships among people as the number of relationships increases almost exponentially. In our experience, the breaking point is when trying to manage the preferences of ten or more people.

David remembers from his previous role as a head of projects at Trade Me:

> *I would come out of meeting after meeting where we as managers would select people for teams or projects based on our best guess. I remember so many conversations that started, "So, what team is Peter going to be in?" or "Peter is going to go into this team."*
>
> *And then I'd have a conversation with Peter's manager or someone else who knew him and they'd say, "Oh, I think he really wants to work on this other part of the product" or "I've heard he doesn't like working with one of the other people there," so we'd go back to the drawing board.*
>
> *We spent hour after hour as managers trying to unravel these scenarios (surprisingly, in hindsight, never actually talking directly to the person in question), and more often than not we'd spend a long time getting it wrong. We had a feeling something wasn't quite right with the way we were doing things, but at the same time it seemed so conventionally sound to carry out management selection. It's what managers do, right? They tell their staff what to work on. But something felt fundamentally wrong about the way we were going about it at the time.*

When you think about it, managerial selection made good sense in its historical context of industrial factories where workers' tasks were relatively simple and repetitive, and workers were pretty much interchangeable. It simply didn't matter who worked with whom, and high-performing teams couldn't achieve anything a random collection of people couldn't get done. In the complex and collaborative workflows of organizations today, however, managerial selection makes much less sense, but our methods haven't kept pace with the amount of change the working environment has gone through.

The same is true of the carrot-and-stick approach to motivating staff, which suggests that people charged with repetitive and boring tasks were best incentivized by monetary rewards. Author Daniel Pink turned the tables on that idea in his 2009 book, *Drive: The Surprising Truth About What Motivates Us [Pin09]*, pointing out that today's work mainly comprises creative, complex, "right brain" activities. Pink cites research that shows the best motivators in such an environment are purpose, mastery, and in particular autonomy:

- *Purpose* gives people an opportunity to fulfill their natural desire to contribute to a cause greater and more enduring than themselves. It's the companies we work for, the customers we're helping, the people whose problems we're solving. Purpose is the reason we go to work every day.
- *Mastery* encourages employees to become better at a subject or task that matters to them and allows for continuous learning. You can have that covered if you hire smart, competent people and give them the opportunity to learn and develop.

- *Autonomy* provides employees with freedom over some or all of the four main aspects of work: when they do it, how they do it, who they do it with, and what they do. Increased autonomy (and in turn increased motivation) is what self-selection is all about. People choosing their own teams, choosing who they want to work with, and choosing what they work on can be the ultimate boost for a culture of ownership.

The Impact of Increased Autonomy

Pink is not the only one to support claims that these motivators are what lead to people performing better. Margaret J. Wheatley,[6] in her research, establishes a clear causality between autonomy on one hand and productivity on the other. Her research shows that productivity gains in truly self-managed, autonomous work environments start at a minimum of 35 percent higher than in traditionally managed organizations.

We have long understood what motivates people, but there's been a significant shift in employee expectation over the last decade, especially with new generations entering the workforce. These newer employees expect greater flexibility, autonomy, and self-management in their roles.

The shift in expectations has been further amplified in the post-pandemic era. Across all generations is a growing preference for hybrid work models, blending remote and office environments, or even fully remote work arrangements. This new norm has led to heightened expectations around autonomy in deciding where, when, how, and with whom to work.

Ultimately, we need team self-selection in order to have motivated people working in high-performing teams. And what better place to start offering autonomy than by letting people decide for themselves which team they would prefer to work in?

The Ideas Behind Self-Selection Are Not New

In 2004 when Atlassian, an Australian company, created their ShipIt Day[7] concept: a 24-hour hackathon that lets employees choose their own projects and teams to build something unconnected to their regular jobs for a single day. Originally named "FedEx Day" after FedEx's 1980s slogan, "When it absolutely, positively has to be there overnight," ShipIt Day went on to become

6. http://www.margaretwheatley.com/articles/goodbyecommand.html
7. https://www.atlassian.com/company/shipit

highly successful and gained worldwide popularity after it was cited by Daniel Pink in his book *Drive.*

Numerous companies around the world, including Spotify, Atlassian, Nintendo, and many others, organize ShipIt Days on a regular basis to kick-start innovation—focusing on the importance of speedy delivery—and to simply have fun and learn new things with new people.

In this fast-paced, fun scenario it has always been a joy for us to see entire organizations self-select into small teams, self-organize, and work on things of their own choosing. ShipIt Day is a study in what happens when you give a group of people complete freedom to work on what they think is important, with whomever they like, using whichever approach they think will work best to get the job done.

When we have observed people self-select into teams for their companies' ShipIt Days, we've always seen the following:

- *People naturally form small, cross-functional teams.* Teams are between three and nine people (even when often no rules exist to suggest an optimal team size in this environment), and team composition is based on skill rather than role. There's no one person per skill, and those T- or pi-shaped people[8] who are good at collaborating are in high demand.
- *No one chooses to work on more than one team or project.* Time and again organizations fall into the trap of optimizing *resources* rather than focusing on outcomes. People often believe that multitasking, having people work across several projects, and focusing on resource utilization are the keys to success, when in reality they're not. It's interesting to note that when employees are determined to ship, no one thinks it's best to do more than one thing at a time, and nobody worries about utilization during a ShipIt Day!
- *People communicate directly and about the work to be done.* Barely any discussions about process or how to communicate take place. Team members just talk openly, coordinate and collaborate as needed face-to-face or using whichever technology makes sense. Things are much faster that way.
- *A shared, clear goal makes everything so much easier.* When people buy into the goal and know clearly the problem they're solving and understand why it's a problem, things become a lot easier for everyone. When everyone

8. https://www.axelos.com/resource-hub/blog/what-employee-type-or-shape-are-you

understands and supports the objectives and constraints around a project or product, making decisions and reaching consensus becomes easier. Selecting what they wanted to work on offered great benefits for ensuring that the team had a shared and compelling goal.

- *Team members are highly motivated, enjoy the experience, and get lots of work done.* In one organization we worked with, some of the things people built, such as the room-booking application called "Get a Room," a virtual receptionist, or the "Is Someone in the Shower?" app for reducing wait times for people in the office who exercised, were simple but valuable additions to the organization and are still in use today.

The idea behind self-selection sprang from the electric energy of these ShipIt Days. Seeing people buzzing with excitement and drive, we couldn't help but wonder whether we could find a way to allow employees to choose who to work with and what to work on in their normal work too. That's how self-selection was born.

Why Self-Selection Works

When we first implemented self-selecting teams, we noticed significant improvements in productivity, happiness, teamwork, problem-solving, and more. Initially, the reasons for these positive changes were unclear, but over time, we identified several key factors that contribute remarkably positive changes to teams and organizations:

Self-selection increases intrinsic motivation.
: People respond positively to the increased autonomy that self-selection provides, which spills over into other areas of their work. This autonomy boosts motivation, encourages ownership, and enhances overall job satisfaction.

Self-selection improves collaboration.
: People are more likely to support and collaborate with teammates they have chosen. They naturally avoid working with people they don't get along with, minimizing petty squabbles and tensions that often arise when teams are mandated. Managers often report fewer things getting "escalated" after a self-selection.

Self-selection enhances engagement with the work itself.
: People choose their teams based not only on who they want to work with but also on what they want to work on. By allowing individuals to select teams based on the areas of the product or responsibilities that interest them most, self-selection ensures that teams are composed of members who are genuinely engaged and passionate about the work they do.

Self-selection is faster than management selection.

Self-selection significantly reduces the amount of time spent on team formation compared to traditional management selection processes. Teams can be formed quickly, allowing everyone to get on with actual work sooner.

Self-selection reduces micromanagement.

With fewer conflicts to manage and less need to predict team dynamics, managers can focus on strategic goals. This benefits both managers and their teams.

Self-selection fosters higher retention rates.

People who can choose their own work and teams are less likely to leave. The freedom to choose teams also attracts new talent, as people prefer workplaces where they can have a say in their team assignments. We know of several highly talented individuals who specifically joined a company "because they heard you can choose your own team here."

What Next?

In this chapter we looked at what's behind successful teams. We introduced the concept of dynamic teaming and reteaming and delved into the reasons why most organizations don't have the luxury anymore of keeping teams stable. We established that self-selection emerged from ShipIt Days and that it has been used by organizations around the world for almost ten years, with the list of successful implementations growing every day.

However, while self-selection can be incredibly effective, it's not a one-size-fits-all solution. In later chapters, we'll also discuss situations where self-selection might not be the best approach and explore the potential pitfalls or limitations of the method. Understanding these exceptions is crucial for ensuring that self-selection is applied effectively and appropriately.

Coming up next, we'll dive into a real-life example from the first major self-selection event. This case study is the cornerstone for all the self-selection methods we see today, having been developed and refined since 2013. It's a great way to get a feel for what a successful self-selection event looks like in action, showing you how it works in a practical, easy-to-understand way.

CHAPTER 2

Self-Selection in Action: A Trade Me Story

Our first trial self-selection event was held in October 2013 at Trade Me, which at the time was one of New Zealand's biggest ecommerce providers. Akin to eBay but with a distinctly new flavor, Trade Me is a household name in New Zealand. It's a platform where nearly two-thirds of the country's population are active members.

In this chapter, we share a case study of how we used self-selection to decide on the structure and composition of 22 new agile teams across Trade Me's product and technology department, a process that involved more than 150 people in three cities—Wellington, Auckland, and Christchurch. We'll describe the problem we had to solve, why we decided on self-selection, how we "got away with it," and how the event and its aftermath unfolded. We'll also share our firsthand experiences and the transformative impact self-selection had on the company and the people involved.

We aim to give you a feeling for what successful self-selection looks like and will show you the ideas and concepts of self-selection against the backdrop of this case study.

Who Are We?

We—David Mole, then part of the Trade Me management team, and Sandy Mamoli, agile enterprise coach at Nomad8—spent several years doing transformational work with Trade Me. If you aren't from New Zealand (or Australia at a stretch), then chances are you won't have heard of the company we're talking about. Trade Me is an iconic Kiwi brand, and the site is a popular place for Kiwis to buy, sell, and trade everything from cars and antiques to clothes, household items, and real estate. It's a Kiwi success story, having grown over the past two decades to a unique position where it commanded more than half of New Zealand's domestic Internet traffic, serving more than

one billion pages per month. For context, only 5 million people live in New Zealand, a country with Internet penetration up around 94 percent.

Trade Me had also been growing pretty fast at the time. In 2012 their technology and product departments had 110 employees, and at the start of 2013 approximately 250. By the time of our first self-selection event, the company had more than 450 people, with no sign of the growth slowing down anytime soon.

What Problem Did We Need to Solve?

The organization had reached a point where the technology department was increasing in size by at least several people each week, but we noticed that adding new people no longer meant they were getting more done; if anything, the speed of delivery was actually slowing down. At the time, people weren't organized into persistent teams; rather, the teams were assembled at the start of a project and disassembled when the work ended. Employees were not dedicated to one team or project either; their time was split into percentages and their allocations were determined by their manager.

Over the course of time a web of dependencies had evolved whereby every person and project was reliant on someone else, and there was always a significant number of handovers and delays between groups of people. Work was constantly being paused and put on hold because no one was available to work on it; everyone was busy somewhere else. No one had a real overview of the people and the work, so there was no big picture of what was happening.

Sound familiar?

We wanted to avoid the delays caused by waiting for people to be freed from other projects, and we wanted to minimize handovers with their associated loss of tacit knowledge. Our strategy was to pull people out of this complex matrix and move them into stable(ish) teams where we could ensure that one person would work on only one team, and one team would work on only one project at any time. (Note that we use the term "project" loosely—technically it was more of a value stream or initiative, as there frequently was no hard start or end date.)

Sparking the Idea

Our work together at Trade Me was already rewarding and enlightening. While typical agile transformations often face resistance, our challenge was different: overwhelming interest and enthusiasm from people eager to join the agile teams. The company's positive culture, focused on problem-solving and embracing new challenges, contributed to this eagerness.

Despite our success in forming agile teams at Trade Me, we hit a snag. We had become the bottleneck. Our cautious, controlled approach of kicking off and supporting a few teams at a time, while reducing risks, also meant delays in forming new teams. We were constantly faced with people asking when they could become part of a new agile team and why it would take so long based on our current plan. The reason at the time was us—we had somehow become the constraint and found ourselves asking people to "please wait" or telling them politely "not now."

We'd been burned by teams setting off too quickly, and the team design had turned out to be wrong with benefit of hindsight. Going through these experiences had led to us taking a less risky, more controlled approach to establishing the new agile teams, but we knew at the time that that speed would need to increase.

We spent a great deal of time trying to think of new and different ways to approach the problems, but we didn't want to see all the great work we had done regress to the chaos and unlimited work in progress that had preceded it. It wasn't until we ran one of our quarterly 24-hour ShipIt Days that the solution dawned on us. We had observed at the very start of the day that the temporary teams were forming with people choosing their own team, choosing to be part of only one team, and immediately forming new bonds with their teammates before they quickly started working together.

It was Sandy who first posed the question, "Why can't every day be like ShipIt Day?" The default retort of course was to laugh and then go back to

the problem of how to quickly get people into teams and of removing ourselves as a bottleneck. Sandy followed that up with, "We could really speed this up if we let people choose their own teams."

We could think of a plethora of reasons why that was a crazy idea, and we have since realized that that skeptical reaction has turned out to initially be the default of almost everyone who is introduced to the concept of self-selecting teams.

The key to overcoming our own fears was to challenge ourselves with powerful questions:

- What if we weren't afraid?
- What if this actually worked?
- What is the worst that could happen?
- Could it really be worse than a managerial selection approach?

When we challenged ourselves to consider the worst case, images flashed through our minds of people wrestling each other on the floor, of people feeling left out, of complete chaos as we ran our self-selection event and people didn't know what or how to choose the right team. However, we knew that with the right process, skilled facilitation, and by placing our trust in ourselves and the people involved, every potential risk could be mitigated or at least reduced. We also knew that we had made mistakes with managerial selection in the past—we didn't get it right every time; in fact, we consistently got it wrong—so could it really be that much worse?

The Trial

When faced with a significant problem and a complex environment, we did what we would recommend to any of the agile teams we work with on a daily basis: we created a controlled experiment to test our hypothesis, and we identified ways to disprove our thinking before we considered doing this at scale. For us that meant running a trial self-selection event involving 20 people and forming just three teams at our office in Auckland.

By the end of that day those 20 people had formed into new teams, and we suspected we had created a process that really worked. Of all the things we learned that day, one of the most powerful was that our worst fears were unfounded: there were no fights, no crying in the corner, and no empty teams or people left out.

One of the ways we knew that we were onto something significant back then came from speaking to the people involved. They were incredibly positive and

glowing about the newfound trust and ability to decide their own future. In fact, we can't think of anything else we've done as coaches that has had such a profound effect on the people we worked with.

Getting Away with It: Overcoming Fears and Skepticism

Buoyed by the success of our trial, we set about creating the main event where the whole product and technology departments would self-select into teams. The trial gave us confidence that we were ready to scale and that, with the right process and skilled facilitation, we could trust ourselves and the people involved to make this work.

The immediate question we faced was *how* we could facilitate such a self-selection at scale with more than 150 people? Should we simply get everyone into a giant hall and tell them to get on with it? Or was there a more structured way that would make the people involved feel safer and more confident?

We tried researching the concept, but we found that at the time of creating the Trade Me self-selection, either no one had carried out a self-selection event at this scale before or, if they had, they hadn't published the process or results. This meant we had to design and develop our own process from scratch.

Scaling required persuading the 150 people who would take part that they were best positioned to make these choices. It meant persuading managers to let go of their team selection responsibilities, and it meant persuading business units to create clear goals and visions for their teams. And communicating this clearly may have been the single most important element to success.

We now recognize the pattern of people's reaction when they first hear about self-selection. Their initial reaction is fraught with fear and resistance—fear of something new and different perhaps, fear of what might happen, fear of being stuck in a team with someone you don't get on with or not being able to change your mind at a later date.

Sandy remembers what it felt like:

> *We didn't know whether this was going to work at the time. We were waiting for someone to stop us at some point because we were doing something that felt outside of everyone's comfort zone, including ours. We were expecting a tap on the shoulder, someone telling us, "Stop, you can't do this," but it never came. And that was scary in itself. We went higher and higher up in management explaining what we were planning to do, and everyone just said, "Yeah, awesome. Try it. But have you thought of all these reasons why it's never going to work?"*

The most common fears seemed to stem from the self-selection process having a negative effect on the people involved. Fears that they wouldn't enjoy making decisions or that there'd be arguments, disagreements, and stalemates. We remember people asking us what to do if they just couldn't decide which team to join, or what we would do as facilitators when people refused to move from an oversubscribed team. Of course in reality people can always make a decision, and even if it's difficult or uncomfortable to make the decision, wouldn't they always be in a better position to make the ultimate call than a manager?

We knew that getting the communication strategy right could be the difference between our self-selection event going badly (or not taking place at all) or becoming a roaring success. People will always throw a lot of questions and what-if scenarios (as they should!), and we learned a lot about how important it is to be honest, proactive, and clear in all communications around something like this. (For more detail on those questions and how to answer them see Chapter 3, Laying the Groundwork, on page 31.)

Sandy remembers:

> *It felt like we were running a PR campaign. In fact, we probably were running a PR campaign: emails, all-company meetings, one-on-one meetings, and conversations at lunch and on the way to the bathroom (even in the bathroom!). We put strong focus on conveying this in these conversations: "We don't think we have the answers. We think you do. We can provide the environment and the facilitation techniques, but we're asking you to solve the puzzle. And you have shown us during ShipIt Day that you can do this." Ultimately, just saying to people, "Look, we trust you to do this" seemed to create a tipping point.*

How Self-Selection Unfolded

With no existing large-scale models to follow, we had to make sure we had a solid facilitation plan in place well before our self-selection event. One thing we knew for sure: just locking people into a room and hoping they'd sort it out wouldn't be sufficient. Not only would success be a lot less likely, but running a self-selection event without a good grip of how to facilitate it would be majorly inefficient and make everyone's experience a lot less enjoyable.

So we crafted a plan and a process from scratch, ensuring it was robust yet adaptable. The approach featured multiple rounds of self-selection punctuated by quick feedback sessions. This iterative process was designed to fine-tune team compositions progressively, leading to the formation of cohesive units—using agile to create agile teams.

In essence, the rhythm of the event was set by alternating ten-minute self-selection rounds with five-minute checkpoints, continuing this cycle until we

achieved a satisfactory array of well-structured teams. (The mechanics of this approach, including detailed setup instructions, are elaborated in Chapter 3, Laying the Groundwork, on page 31, Chapter 4, Getting Ready, on page 55, and Chapter 5, Running a Self-Selection Event, on page 73.)

Kicking Off the Inaugural Event

We started the much-anticipated day with an orientation session where we welcomed participants, reaffirmed the event's goals, outlined our vision of success (creating as many fully formed teams as possible), and laid down the ground rules.

We envisioned success as the creation of fully formed teams guided by a straightforward *definition of what a "done" team looked like*. We intentionally used as few criteria as possible to avoid over-complicating the process and stifling creativity. The guidelines were simple yet effective: teams must be capable of delivering their purpose, sized from three to nine team members, and based in the same city. Anything more would just have increased complexity and most likely have stopped people coming up with solutions (the kind we could never have thought of ourselves).

At the start, we made a point to clearly communicate the possibility that some participants might not immediately find a team. We emphasized this was a normal part of the process, not a failure on their part, and that we had plans in place to ensure that everyone would eventually find a suitable team by the end of the day. This helped to normalize the situation and reduce any potential anxiety about being left out. It also allowed participants to focus on making thoughtful choices rather than rushing to secure any spot on a team.

Visual cues played a significant role in facilitating our self-selection event. We had prepared the venue with spaces representing each desired team, blank canvases awaiting participants' photos to be added. From the moment participants entered the room they were invited to pick up their photographs from a table, a gesture intended to make them feel included and to prepare them for active engagement in the self-selection process where they'd be moving their photos to visually indicate team preferences.

We created all the empty team spaces, each bearing a clear title and ample space for three to nine photographs that would sit in each. One decision we made to support the self-selection process was that the product owner was predetermined for each team, grounded in the rationale that domain-specific knowledge (such as selling cars or property) was crucial for product leadership.

After the introduction, we transitioned into a segment where product owners outlined their vision for the team one by one, ensuring everyone understood the mission, goals, and requirements of each team. This presentation sometimes included details on the type of work involved, whether it was front-end design-focused or back-end database-heavy for example, allowing participants to make informed decisions about both their team and the work.

Our guiding principle, "Do what is best for Trade Me," was a constant backdrop throughout the day, reminding everyone that self-selection was more than personal preference; it was about entrusting individuals to make decisions that would benefit the entire organization. This ethos was not just metaphorical but was also physically represented in the room, ensuring that every choice made during the event was aligned with the overarching goal of organizational well-being and success.

Navigating the Self-Selection

The key to our approach was that it was agile and iterative. We observed, learned, and adapted over several rounds. At each checkpoint we assessed team compositions, addressed any imbalances, and encouraged discussions to resolve them.

David describes his experience:

> *As facilitators, our greatest fear was that we'd shout "Go!" and nobody would move. That was my real point of worry: what would happen next? And what actually happened was that people at first moved really slowly. But they moved. At first, they just hovered by a team and chatted to someone next to them. They weren't really doing anything at this point. They were just watching each other. There were all these empty team spaces on the wall, and when someone would take their picture and make a move, everyone would look up thinking, "Where are they going to?"*
>
> *Once people started to understand the process, they started talking to each other. "I'm thinking about moving to this team. What do you think?" People were sharing their thoughts and ideas with each other. It was great to see. It was slow at first, yes, but then they really got on with it.*

Navigating through the process was steering through uncharted waters, with each round bringing us closer to our goal. The initial round was chaotic. Teams were either overflowing or under-resourced. A memorable moment was witnessing a team composed entirely of four testers, a clear indicator of the adjustments needed ahead.

Yet, with each round, the process smoothed out. By the second round, we saw significant progress, with the first few teams beginning to take shape in a more balanced manner.

The third round was a tipping point. Conversations grew from cautious whispers to enthusiastic discussions. People began to really grasp the process, engaging in discussions, negotiations, and even lobbying. Product owners reengaged with their pitches, and people began to see the possibilities. This was where the process seemed to click into place for everyone involved, culminating in the formation of well-structured teams. Our initial fears of conflicts or people being left out were quickly dispelled. The focus shifted from individual preferences to collective decision-making, ensuring that everyone found the best possible place, even if it wasn't their initial preference.

Wrapping Up the Self-Selection

However, the journey didn't end there. While we had mainly full teams, we were still left with at least 20 people and four teams still far from completion. At this juncture, we made the decision to send the majority of complete teams back to their daily work, focusing our attention on the remaining participants. Our goal was to ensure these people didn't feel sidelined or less valued, a sentiment we were determined to avoid at all costs.

In a collective effort, we deliberated on various strategies to address the remaining parts of the puzzle. One individual made a noteworthy sacrifice to help balance the teams, a gesture that underscored the collaborative spirit of the event. They chose to work in an area that was certainly not their first choice; in fact it was a significant personal compromise in the best interests of solving the problem and doing what was best for the company. Despite an initial concern that we might not achieve the perfect match of skills and numbers for all intended teams, the outcome was remarkably positive, and with a couple of exceptions, we had almost 150 people now allocated to teams they had selected themselves.

Leveraging "hire cards," a creative tool representing potential future team members, we managed to form all of the initially envisioned teams. This result not only exceeded our expectations but also highlighted the efficacy and adaptability of the self-selection process. The journey underscored the importance of flexibility, collaboration, and a shared commitment to overcoming challenges, ensuring no one felt like an outsider. This experience was a testament to the potential of self-selection to foster a sense of belonging and achievement among all participants.

Observation: How Did People Choose?

It was fascinating to observe what people based their team selections on during the event. The single most important factor was personal relations—who people want to work with and who they don't want to work with.

It can be hard for people to admit this up front though. In a survey we conducted after the event, most people said they had based their choices exclusively on "doing what was best for Trade Me," but that ran contrary to our observations. During the day most of the conversations we overheard were about who wanted to work with whom, and we noticed that some people were only available in twos or threes. Often when one person moved, other people immediately moved along with them.

Sometimes people didn't want to work with each other. And that was okay. People often know whether or not they're going to gel in a team with a particular person, and if not, it makes sense that they would choose not to work with them. We observed two people in particular who seemed to have taken a dislike to each other. When one of them moved their photo to a team the other one was in, the first one would move their photo to a different team. This happened several times, and whenever those two coincidentally ended up in the same team, one of them would move again. Far from being a bad thing, this simple action probably saved them and their teammates months of pain and protracted conversations.

Overall, our results showed that the vast majority of people liked the team they ended up being part of. Somewhat surprisingly, most people told us that they now work with the team they expected to work with, so people did certainly seem to go into the day with expectations about the outcome. After the day, almost everyone was in favor of self-selection as the best way to design teams. Even people who initially feared and doubted the process came away with positive reflections and an appetite to do it again.

While most participants found the self-selection process empowering, it's essential to recognize that some initially struggled with the concept. Concerns varied, from fears of being left without a team to doubts about the fairness of the process. However, with clear communication and thoughtful facilitation, many of these individuals grew to appreciate the transparency and autonomy that self-selection provided. Still, it's important to acknowledge that, no matter how well a process is designed, it may not resonate with everyone, and addressing these concerns is important for creating a supportive environment.

The Impact and Results

The impact of self-selection for the people involved has been far more than simply making the choice of who to work with. We've observed that self-selected teams remained far more stable. We measured the team changes between our teams that were selected by managers versus those that self-selected, and while there were still some inevitable people changes at different times, people chose to remain in their self-selected team far longer than they had before.

Our measurements also told us that happiness and motivation was significantly higher. We measured this using a short survey we created based on questions around their feeling of happiness, the support they received, and whether they had autonomy, mastery, and purpose in their role.

Importantly, we found that the delivery and productivity of these teams also went up significantly following self-selection. We saw an improvement of approximately 20 percent when compared to teams who were chosen by a manager. Of course, measuring productivity for agile teams is hard, but we settled on measuring the number of user stories shipped to production as a proxy for measuring productivity. This meant we would have a solid team-based measurement of output. The reason we liked and chose this option was because if people tried to game the measure (as they inevitably do with things like this), they would ship to production more often or they would slice their user stories to be smaller, both of which would be behaviors that we wanted to encourage regardless of measuring productivity.

When we look back now, we think we were both expecting self-selection to fail and that we had probably missed something significant in our preparation. However, what actually happened was the opposite, and to this day the Trade Me self-selection event remains one of the most surprising and important days of our careers. The outcome was astonishingly positive, defying our apprehensions. The process wasn't just successful; it was a revelation, both for us and for those involved.

Of all the things we learned that day, one of the most powerful was that our worst fears were unfounded: there were no fights, no crying in the corner, and no empty teams or people left out. When people are trusted to act like responsible adults, they will do so and more.

Embracing Self-Selection

Embracing self-selection at Trade Me symbolized a shift toward greater trust, autonomy, and progressive team dynamics. Today, self-selection is an integral part of team formation at the company. A self-selection event is held at least every six months, where even if there's no immediate reason to change teams, people are still offered the chance to assess their decision, stay where they are, or choose a new team.

Self-selection at Trade Me has become not just a process; it's a testament to what can be achieved when people are empowered to choose their path.

What Next?

As we move forward, we'll delve into preparing for your own self-selection event. You'll get ideas, tools, and advice, including a checklist for assessing your readiness, guidelines for the right number of rules and constraints, advice on logistics, and insights for how to create a custom-made facilitation plan. We aim to equip you with everything you need to bring this empowering approach to your organization.

Part II

Mastering the Self-Selection Method

CHAPTER 3

Laying the Groundwork

In this and upcoming chapters, we dive deep into the essential groundwork required for a successful self-selection experience. We explain why the key to success lies in mastering two crucial elements: ensuring the safety of your participants and fostering crystal-clear understanding of the decisions they will be asked to be part of. But don't worry; we walk you through how to do this, taking one step at a time.

First, in this chapter, we aim to demystify the self-selection process, providing insights into why meticulous preparation is paramount and addressing potential challenges you might encounter when getting started. We walk you through the strategic considerations that need attention weeks or even months ahead of the event. The timeline may vary based on your specific context and scale, but as a general guideline, if this is your first self-selection and it involves more than 60 participants, you should start your planning at least six weeks in advance, as a wealth of work requires your attention.

As discussed in Chapter 1, reteaming plays a critical role in ensuring that teams are adaptable and resilient, which is why our preparation phase is so thorough. Our guidance in this chapter extends to conducting a readiness check, obtaining the necessary permissions, effectively communicating concepts and plans, coordinating logistics, and determining the scenarios where a trial event can prove valuable.

Preparation Is Vital!

Before we delve into the initial steps, it's important to emphasize just how crucial it is to prepare well in advance. We advocate for leaning toward over-preparation because it not only enhances your chances of success but also instills a sense of ease, transforming you into a more composed and effective facilitator.

Self-Selection at Scale

When we conducted our very first self-selection at Trade Me (described in Chapter 2, Self-Selection in Action: A Trade Me Story, on page 17), we spent months planning and put an incredible amount of thought into the smallest of details. By sharing what we used, created, and refined in this book, we hope to significantly cut down on the time you will need to invest, but we expect you'll still need to go through similar stages of laying the groundwork.

Sandy describes what was involved in those early stages at Trade Me:

> *After we had made the decision to run a self-selection, we spent months planning it. For example, we spent a full day just preparing the materials we would need—gathering photos of more than 150 people, drawing team templates, and creating visual signals for teams.*
>
> *We spent a lot of time getting the environment right, acknowledging that the environment (whether it is physical or remote) has a significant impact on how people think and behave. We put a lot of time and effort into creating an environment that would be as conducive as possible to a successful team selection.*

Jane Freider, who as head of engineering ran a successful, fully distributed self-selection event at one of the biggest recruitment websites in the world, a job portal with millions of customers across both Asia and Oceania, had a very similar insight on preparation:[1]

> *I'd say this is a huge part of the actual self-selection process; you can't just jump right into it. It took us about one and a half months to execute all the steps.... Without holidays, we probably could have done it faster, but still it really depends on how fast decisions are made in your company and how well the new teams are understood, their priorities defined, team leaders identified, and so on.*

Now that you understand that you're going to have to roll up your sleeves to start planning, we'll explain the steps in detail to ensure that you've done the necessary groundwork to conduct your own self-selection.

We start with how you can identify whether you are indeed ready to start designing your self-selection.

Step 1: Conduct a Readiness Check

We believe that ultimately anyone can run a self-selection event or, at the very least, be able to actively demonstrate the principle of giving people autonomy to choose who they work with and what they work on. To kick off this transformative process, it's essential to ask yourself a series of questions

1. https://medium.com/@jane.freider/self-selection-with-distributed-teams-how-to-make-it-happen-af4d249772a4

to ensure that you have all the prerequisites for a successful event. The cornerstone of a successful self-selection is getting two fundamental elements in place: safety and clarity.

Safety, in this context, refers to crafting an environment wherein individuals experience a sense of security while navigating decisions and balancing the interests of themselves, their team, and the organization. Establishing psychological safety serves as a crucial precursor to your self-selection, and our observations underscore that the psychological safety of your teams will demonstrably grow during and after this process as a direct result of the trust you place in the people involved.

The second vital component is *clarity*. Participants must have a crystal-clear understanding of the decisions they are tasked with making, their available options, and the actions they need to take during the event. The more transparent you can make these aspects, the more effectively participants will respond.

Organizational Readiness

To determine if you've achieved the right balance of safety and clarity within the organization for a self-selection event, consider the following questions:

SAFETY AND CLARITY CHECKLIST

- ☐ Do you currently have, or can you secure, support from senior management?
- ☐ Is there willingness among team members to embrace the concept of self-selection?
- ☐ Is the timing opportune for implementing self-selection?
- ☐ Do you have, or can you establish, small cross-functional teams?
- ☐ Are you adequately prepared to address inquiries from participants?
- ☐ Have you contemplated a small trial or a twenty-four-hour hackathon?

Do you currently have or can you secure support from senior management?

At the heart of every successful self-selection process lies the crucial step of garnering support from senior management. In Step 3: Get Permission on page 39, we delve into strategies for obtaining the endorsement necessary to move forward with your self-selection event. We explore how to articulate the benefits of self-selection to leadership and navigate potential reservations they might have.

Is there willingness among team members to embrace self-selection?

Before diving into the intricacies of self-selection, it's important to gauge the openness of your team members toward this approach. This willingness is a cornerstone for ensuring the process not only begins on a positive note but also maintains momentum. We delve into strategies for fostering this willingness and preparing your team for a smooth transition to self-selection later in this chapter in Navigating Stages of Acceptance on page 41.

Is the timing opportune for self-selection?

Timing can significantly influence the success of a self-selection initiative. It's essential to assess whether the current organizational climate and external environment are conducive to introducing such a transformative process.

Do you have or can you establish small, cross-functional teams?

The formation of small, cross-functional teams is at the heart of self-selection's success. If deliberation is ongoing within your organization about such teams, it could impede the smooth execution of your team selection. In such cases, dedicating time to research, experimentation, and resolution becomes paramount. In our initial case study, before venturing into self-selection we identified and addressed several sizeable challenges, including individuals juggling multiple projects and ad-hoc teams forming and disbanding based on shifting temporary priorities. Prior to self-selection, we demonstrated and proved the value of small, cross-functional teams.

Are you adequately prepared to address questions and concerns from participants?

A critical aspect of preparing for self-selection is anticipating and addressing the myriad of questions and concerns that will inevitably arise from participants. This chapter underscores the importance of creating an open dialogue, ensuring you're equipped with the knowledge and sensitivity to address these inquiries constructively. In Step 6: Communicate Early and Often on page 52, we provide a deeper look into common concerns and effective communication strategies to build confidence and clarity among all involved.

Have you contemplated a small trial or 24-hour hackathon?

Considering a trial run, such as a small-scale self-selection event or a 24-hour hackathon (also known as a ShipIt Day), can serve as a valuable precursor to a full-scale self-selection process. This initial exploration allows you to identify potential challenges and opportunities, setting the stage for a more informed and effective implementation. In Step 2: Carry Out a Trial on page 36, we explore the benefits of such trials in detail, offering practical advice on organizing these events to maximize learning and engagement.

If you find yourself answering no to any of these questions, don't worry! It simply implies that you might need to do some additional groundwork. Understanding your starting point is all you need to do, and we'll guide you through effective strategies to make progress in each of these areas.

Personal Readiness

While the preceding questions are geared toward the organization, it's equally vital to assess your personal preparedness for facilitating. You should anticipate a barrage of questions and concerns from individuals, as changing familiar practices, such as team selection, inevitably triggers both curiosity and resistance.

You should expect to be asked lots of questions if this is a new idea for your organization. You'll know the people involved best and therefore how to best explain your answers, but it may also be helpful to refer to these responses:

- We have an overall expectation people will behave like trusted adults and resolve problems maturely. If not, we have problems outside of self-selection!
- We have confidence in the process; it has been tried and tested many times in many organizations, and it's been shown to work.
- When we choose teams by managerial selection, we often get things wrong.
- Let's treat this as an experiment.
- You are selecting the team you'll work with on a daily basis. Your manager won't change.
- People will have the chance to choose teams again; this is not a "once and done."
- Even if it doesn't fully work, we'll learn a lot about the people, their preferences, and their relationships, which will be useful for whichever method of team selection we choose in future.

- We're not suggesting that self-selection is perfect or a silver bullet, just that it's better than the alternative of managerial selection and therefore something we want to try.

Of course, there's no certainty that self-selection will work for you, but thorough preparation will help reduce the uncertainty as much as possible and increase the likelihood of success.

If you're still unsure whether to go ahead at this point, then like the earlier questions suggest, one way to get further insight into the potential outcome is to consider running a ShipIt Day (or hackathon) and ask people to self-select into teams for that short-term event. This will allow you to see how they react to self-selection in a smaller, safe, contained environment. If they can work out how to self-select into teams for a hackathon, the chances are good they'll figure it out in real life too. It will also make people feel more confident when you can point to a real and recent example they've been part of. (You can read more about ShipIt Day in The Ideas Behind Self-Selection Are Not New on page 12.)

Step 2: Carry Out a Trial

Before diving into a large-scale self-selection, consider conducting a small, contained trial event to gather insights, test your concepts, and secure buy-in from participants. Unlike the temporary nature of a hackathon event, this self-selection trial, perhaps spanning two to four teams, will provide a controlled environment to familiarize people with the process and proactively address potential challenges on a smaller scale. A trial, involving approximately 15 to 20 people (or two to four teams), will offer up valuable information and insights. (Note: if your full self-selection involves fewer than 30 people, skip the trial and proceed directly to Step 4: Define the Teams to Select on page 45).

When we initially explored the concept of self-selection and designed the process, opting for a trial allowed us to operate within a more controlled environment with a smaller group to test and refine our ideas. Conducting the event with 20 participants in just one location and business unit, we employed a straightforward process involving short iterations and open discussions. Within a few short hours, 20 individuals self-selected into three teams, confirming the viability of our concept, which we then refined for larger-scale implementation.

All members of the newly formed teams either joined their preferred team or fully comprehended the reasons behind compromises that had been made.

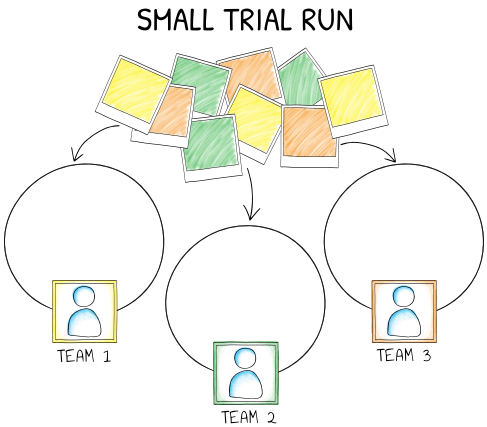
People Won't All Get Exactly What They Want

One important point to recognize is that self-selection is not about everyone getting their first choice of team. If it was, you could use a survey and you wouldn't need a facilitated event. It's about people making informed choices together, along with all the compromises, trade-offs, and painful discussions. Self-selection is about enabling a healthy conflict among the people who know most about the subject in hand.

The level of buy-in surpassed anything we had witnessed before. We also knew at the time that even if the trial hadn't succeeded in the ways we'd hoped, the short loss of time and effort would have been minimal.

An additional benefit of running a trial is the transformation of theory into practice, as it equips a group of individuals to speak about their experiences and advocate for the concept. This also nicely aligns with an agile approach of starting small, seeking feedback, and refining the solution instead of attempting to solve the entire challenge in one big bang.

To conduct a trial, you only need a few essentials: a group of individuals willing to try something new (tip: begin with your simplest area of your business, not the most challenging—something we refer to as the bright-spot strategy). You'll also need a list of teams to form and photographs of those involved (printed if the selection is in-person or on a visual board if partially or wholly online). For a small-scale trial, create empty circles for each team, and make a photograph available to each participant. They'll simply be placing their photo in the circle of the team where they want to work, as shown in the following illustration. If an optimal solution isn't reached initially, just pause and regather to discuss challenges and then try another short timebox for people to make adjustments and come up with solutions.



During our initial trial, not only did we form our first teams using self-selection, we also refined the process for the later self-selections we have undertaken. The key takeouts that surfaced during our trial remain true today:

- *Speed up.* Going into our trial we believed that a full day would be the right amount of time to acknowledge the importance of the choices people were making, but allowing for such significant time actually led to continuing into the next day to mop up some smaller issues. We didn't want this process to take several days, so rather than extend the time frame, we have since focused on identifying ways to speed up the selection process itself. For example, improving visual management is one way to increase speed and get to the desired outcome earlier.
- *Make everything bigger, bolder, and brighter.* Make it easy to interpret the status of a team at a glance. Our early attempts at visualization weren't perfect. Big color photographs and big green check marks and red X's were introduced later to indicate whether a team is complete and to point people's attention where it was most needed. Making things big and clear is important whether you are in-person or remote. Don't scrimp on visual aids, and if you need to justify the time it takes to get them right, consider the cost of having people in the room for longer than necessary. A well-prepared visual presentation will save time, and everyone will appreciate it.
- *Create momentum and a cadence.* Use short sharp timeboxes (for instance, 10 minutes) during the self-selection process and focus on moving forward at speed, thus keeping the momentum until the final teams are formed or until you can see your blocking issue(s) clearly.
- *Provide extensive pre-event communication.* We've always found this to be incredibly important, perhaps even more important than what you do on a self-selection day itself. We had made assumptions for our early trial, and in hindsight we could have done more to raise the level of awareness and knowledge prior to the day. For example, one of the things that caught us by surprise was the number of questions raised about the leadership roles in the teams (such as product owner); we shouldn't have assumed that everyone's level of knowledge about those things would be the same.

And these things are not just true at Trade Me. The case study of a large Swedish bank[2] offers practical insight into the benefits of conducting a small-

2. https://youtu.be/w5HsPBAdB_Y?si=QKgcr2RCwus1cFAF

scale trial before the main self-selection event. When they embarked on a strategic pivot from component-based teams to ones aligned with customer-centric purposes, their transformative journey began with a meticulously planned trial involving four teams.

The bank opted for an extensive three-month period dedicated to planning, learning, and communicating before the initial trial. This foundational work was important in addressing a wide array of concerns and uncertainties, allowing for a more confident approach to their main event. The trial made it possible to conduct the larger-scale self-selection just one month later, expanding it to include 9 additional teams, thereby creating a total of 13 new teams and the bones of a new operational model.

The outcome of this initial trial and the subsequent full-scale self-selection exceeded their expectations. Despite acknowledging that the process wasn't flawless, the consensus was clear: self-selection presented a superior alternative to traditional management-led team formation, and the trial before scaling the event had been invaluable.

An Alternative Trial

An alternative way to test out the process is to run a pretend self-selection, where you can test the concept and refine it without risk. This would involve people picking teams but not having to work in them later; instead they simply follow the self-selection process to learn how it works. We've known companies that do this, and it could work well for you too—just be aware that people behave very differently when they're not making real choices with real consequences. It's like playing poker for no money: players can throw their chips around when they have nothing to lose, but it can be valuable to learn the rules and practice.

Step 3: Get Permission

Once you've made the decision to move forward with self-selection, the next challenge is to convince others within the organization that this innovative approach is beneficial. Simply announcing, "Hey, we want to do this thing called self-selection," and proceeding might not be the most effective strategy. Convincing various stakeholders, both within and outside the teams, and managing their expectations is crucial.

It's also important to recognize from the start that achieving full unequivocal buy-in for self-selection up front is unlikely. Therefore, your initial task is to sell the idea and persuade individuals that self-selection is the best path forward in your context yet acknowledging they may not fully agree or back

your suggestion at this stage. Depending on your position within the overall hierarchy, seeking forgiveness from some people afterward might be a more appropriate approach than chasing full permission beforehand.

Navigating Initial Resistance

One of the most common questions we get asked when we describe self-selection is "How did you get management to agree?" In all honesty, we didn't secure full buy-in at Trade Me when we first introduced this concept. However, we were fortunate to be part of an organization that operated based on high trust, where managers were willing to explore new ideas without fear of repercussions.

In our case, we felt compelled to proceed rather than attempting to gain unanimous approval initially, as achieving such consensus seemed nearly impossible. While we didn't strictly ask for permission, it's crucial to note that we didn't act recklessly either, and neither should you. We proceeded cautiously and methodically, keeping everyone informed at every step. Our approach prioritized full transparency throughout the process. If anything, we may have leaned toward over-communication, but our focus remained on explaining the upcoming steps clearly rather than seeking unanimous agreement up front.

We discussed the inherent risks and openly acknowledged our own uncertainty to people, focusing on an open, honest, and vulnerable leadership approach. What we were certain of, however, was that the worst-case scenario wasn't so bad. In essence, the most significant consequence to trying this would be a day of lost productivity (a setback we could quantify monetarily if necessary). We were able to convey that in the event of this approach faltering, reverting to managerial selection remained a viable fallback, albeit armed with a wealth of newfound information. Jan Wagener, who conducted a successful self-selection at a major German car manufacturer, confirms:

> *What ultimately convinced people was telling everyone it might not work, but even if it didn't, they would then have a sound basis for management selection.*

It's essential to recognize that managerial selection comes with its own set of uncertainties; there's no guarantee that managerial decisions would inherently yield better results, but it can make people feel more comfortable to know there's an option to return to the status quo. This is a key point to emphasize in your discussions: the manageable scale of the risk. Ask the question, "What's the worst that can happen?"

Furthermore, our position of strength was fortified by the successful trial event, providing us with valuable insights and enabling us to set realistic expectations. If you harbor doubts about the scalability of self-selection in your context, consider conducting a trial. In seeking the necessary permission, a combination of transparency, honesty, and determination are paramount in your communication. You'll find that adopting this approach can take you a long way.

Now, ten years after the publication of the first edition of this book, it's often managers who initiate self-selection and move the decision-making downward away from themselves. They might have heard about the benefits of self-selection and want to do the best for their people. Jody Weir, head of agility at one of Australia and New Zealand's largest online fashion retailers, described it this way:[3]

> *We decided to try…self-selection because we thought it might be a better approach to what we were currently doing, which was having managers decide who was on which squad. We hire exceptional people and thought they could best decide what and who they worked with while keeping the interests of the company front of mind.*

However, even if you won't have to convince management, you'll still have to navigate the same stages of acceptance with the teams and participants.

Navigating Stages of Acceptance

Drawing from our experience, we understand that people may initially react with fear or resistance to a concept like self-selection. Shock and surprise often accompany their first impressions, accompanied by a lengthy list of fears and reasons why self-selection may not work. In guiding colleagues through the journey toward embracing or at least accepting the idea, we've identified several stages that individuals, including ourselves, tend to go through.

Stage 1: Doubt (What If It Doesn't Work?)

At the very beginning, people may be taken aback by the idea and voice fears mostly in the form of "what-if" scenarios. Common initial questions about the idea of running a self-selection event might include those listed on page 42.

The main sentiment is usually, "Nice idea, but really, this is not going to work." We went through that thinking ourselves, yet we were confident enough to walk around the business and watch jaws drop when we explained what we were thinking of doing: letting people choose their own teams.

3. https://theiconic.tech/our-experience-with-squad-self-selection-spoiler-alert-do-it-f815ee573648

WHAT-IF QUESTIONS

- What if everyone wants to work in this particular area?
- What if no one wants to work in that particular area?
- What if I don't know what I want to choose?
- What if I make the wrong choice?
- What if it ends up in total chaos?
- What if no one wants to work with this particular person?

During this early stage, the most important element is to "rip the bandage off" and get the idea out there, then to listen and acknowledge people's fears and concerns. Take the time to talk through their worries, but slowly encourage people to see the opportunities and potential benefits. Our approach to communicating the self-selection idea can be summarized as "explain the idea like you're right, then listen like you're wrong."

Over the last decade, navigating the waters of "what if…" questions has offered us valuable insights. Here's what we've learned:

What if everyone (or no one) wants to work in this particular area?

The fear that everyone will flock to a so-called A-Team, leaving other teams in the lurch, or conversely, that some areas—such as Business As Usual (BAU)—would be universally shunned, is common. However, experience shows that there's a place for everyone, and preferences vary widely—what's one person's drudgery is another's dream job.

On the rare occasions where there really is an area people don't want to work in, it provides invaluable insights into organizational blind spots. Ask yourselves, isn't that great information to have? Wouldn't it be great to discover where you have a problem and get the chance to do something about it? In fact, not running a self-selection for fear of uncovering issues would be like not going to the doctor in case they found out you were sick!

What if I don't know what I want to choose?

Introducing self-selection often conjures up childhood memories: "Won't there be one person left on their own? Like the last person to be picked for sports in the schoolyard?"

The anxiety of being the last picked is a relatable fear for many, translating into worries about the self-selection process. Yet the beauty of self-selection lies in its fundamental difference: individuals choose their paths; they're not arbitrarily chosen. No one actually gets picked; people choose for themselves. So it's not like a school yard!

For those uncertain about where they fit, the process accommodates this by allowing them to signal their openness to teams seeking their skills. Even organizational newcomers or the exceptionally hesitant are being catered for because the process allows you to highlight yourself to the other teams who may be looking for someone with your skills.

What if I make the wrong choice?

The essence of self-selection is to foster stable(ish) yet adaptable, dynamic teams. It's about making an informed choice, not a lifetime commitment. We ask people to make an effort, but if they find they really dislike their new team and can't make it work, we'll have a conversation to find a solution and move the person to another team. Also, with additional self-selection events proposed every six to nine months, there's always a horizon for change, encouraging the kind of experimentation and growth we want to see.

What if it ends up in total chaos?

Aren't people going to start arguing and complaining? Well, from our experience, we can tell you that they don't! The specter of chaos, of disputes spiraling out of control, haunts many at the outset of self-selection consideration. Yet when individuals are approached with trust and treated as mature adults, they rise to the occasion. A key point is that when you treat people like trusted adults, they behave like trusted adults. They have mature conversations; they debate and discuss, but ultimately they compromise, not fight.

What if no one wants to work with a particular person?

It's a hard truth that not everyone will want to work together, and that's perfectly okay. Self-selection shines a light on interpersonal dynamics, allowing individuals to gravitate toward teams where they feel they'll thrive.

People know whether or not they're going to gel in a team with a particular person, and if not, it makes sense that they would choose not to work with them. During one of our largest self-selection events, we observed two people in particular who seemed to have taken a dislike to each other. When one of them moved their photo to a team the other one was in, the first one would move their photo to a different team. This happened several times and whenever those two coincidentally ended up in the same team, one of them would move again. Problem solved before it has even had chance to show up.

Some people may worry that uncovering these kinds of issues will lead to long-term conflict or cross-team disagreement, but in fact, we've always seen self-selection as the solution and not creation of problems like this. Prior to self-selection these people would be forced to work together, and feuds would have a negative impact on their teammates and lead to no end of managerial escalation. Now these people could choose to work separately.

If self-selection does reveal a person universally avoided, it's a clear sign that deeper issues need addressing. Self-selection doesn't create these problems, but it might uncover existing ones. And isn't it better that you can now work with that newfound knowledge and address issues constructively?

Stage 2: Inspiration (What If It Does Actually Work?)

At this second stage people might be able to see the potential of self-selection. The profound nature of the idea of working with whomever they want on whatever they want begins to take shape in their consciousness. It's now seen as a feasible option.

It's very important in this stage to keep communicating. We recommend utilizing company presentations, group meetings, emails, and one-on-ones. (We go into more detail on this in Step 6: Communicate Early and Often on page 52.)

Stage 3: Acceptance (How Will We Make It Work?)

People then start to realize that self-selection is a serious option and that issues they may have feared can in fact be overcome to make this happen. They start to trust the process and actively support the idea because ultimately this is good for them and the people around them.

During this stage a lot will depend on you being able to have them trust you and the idea—to believe that you are well prepared, have thought through potential issues, and have a solid facilitation plan for the day. The best way

to achieve this is to be absolutely transparent with everyone involved as well as with those around the teams who might not be directly involved in the selection itself but might be a recipient of the result (such as stakeholders, managers, and specific enabling roles).

Anticipate the stages of acceptance that people will work through at their own pace; don't rush.

Step 4: Define the Teams to Select

Once you've defined your readiness and received sufficient permission, it's time to define the teams that people will select into. It's not recommended to have people define the teams at the same time as selecting into them. Those are two very different problems to solve, so we propose designing the (empty) required teams up front.

Deciding which teams to maintain or establish can start with your existing team structures or represent a line in the sand where you move to a new or highly adapted team structure. This can be a complex undertaking that demands company-wide reflection on long-term goals and priorities.

For this foundational phase, we often turn to the principles outlined in the Team Topologies framework,[4] which offers a robust blueprint for structuring your organization, ensuring teams are purposefully aligned with your organization's demands. For a deeper dive into applying these principles to your team architecture, we highly recommend *Team Topologies: Organizing Business and Technology Teams for Fast Flow [SP19]* by Matthew Skelton and Manuel Pais. You can also review Jurgen Appelo's unFIX model[5] for guidance.

Initially for us at Trade Me, the company-wide prioritization was exclusive to the executive team and closely linked to the company strategy. However, as news of the plan to establish new teams reached the people involved, they understandably wanted to contribute to its success. While remaining vigilant to maintain a line of sight to the company strategy, we implemented a straightforward process for submitting requests for new teams: if someone desired a team to support a feature stream, a product, or a specific area of the business, the executives would consider it for inclusion. Ultimately for us, the executives decided and created and finalized a finite list of teams, albeit without stating who would be in these teams, of course.

4. https://teamtopologies.com
5. https://unfix.com/blog/is-reteaming-something-for-you

Don't Change Reporting Lines

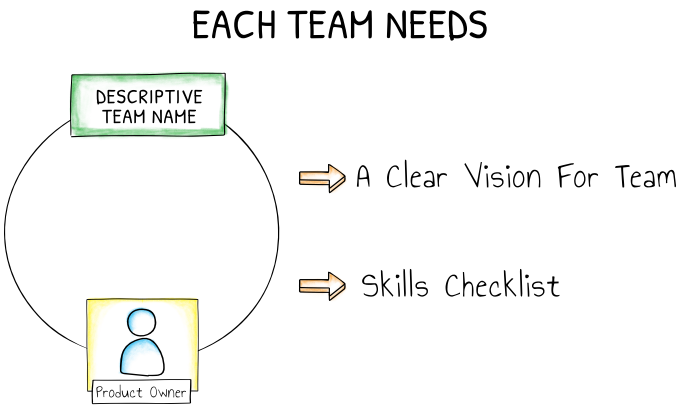
We recommend focusing exclusively on team structure during self-selection, not on reporting lines. Self-selection is about team design—deciding who works with whom. Changing reporting lines at the same time complicates the process, as people will be influenced by who their new manager would be. This adds unnecessary complexity and undermines the integrity of self-selection. Keep the two separate.

Determining the exact number of teams needed poses a challenge because with varying team sizes (between three and nine members) it's not always clear up front how many teams will be filled. Your focus should remain on aligning with business needs, perhaps leaning toward slightly more teams rather than risking having too few.

Our plan (described in Chapter 2, Self-Selection in Action: A Trade Me Story, on page 17) encompassed creating more than 20 teams spread across three locations (Auckland, Wellington, and Christchurch in New Zealand). After prioritizing and planning the broad scope of those teams, the next step was to articulate a clear purpose for each team, enabling participants to choose their preferred work focus, knowing the types of problems they would tackle when they chose a team.

For our self-selection event, we wanted each team to have at least the following (see the figure that follows):

1. A clear vision and mission for the team's work and the types of customers to support.
2. A skills checklist outlining the skills required to achieve the vision and mission.



We did this because we didn't want anyone walking out of the self-selection feeling like they weren't sure what they would be selecting into, or worse, thinking farther down the line that "this is not what I signed up for!"

Establish Team Names and Missions

Our recommendation is for teams to have a clear and compelling mission rather than a general purpose. In his 2002 book, *Leading Teams: Setting the Stage for Great Performances [Hac02]*, J. Richard Hackman cites research showing how teams need to have a clear, challenging, and consequential mission to engage team members' motivation and to orient them in a common direction. Without this mission, collaboration will suffer and the team may never reach a high-performing state.

Defining a team's purpose is a responsibility ideally entrusted to the product owner and their stakeholders. The product owner is the person best positioned to delineate the types of work a team could tackle. We recommend avoiding making promises about specific pieces of work or a rigid roadmap that might later change, which might later prompt team members to question the authenticity of the information provided at the time.

The more adept product owners are at explaining their team's mission and their own working methodologies, the greater the likelihood of attracting not only a high-performing team but, equally crucial, a team aligned with their values and working styles. While some product owners inquire about participating in the selection of their own team ("Why can't we select our teams too?"), there's clear rationale for initially fixing this variable. It simplifies the overall puzzle, it reduces the moving parts, and it creates some up-front clarity that can be essential to creating a healthy self-selection environment.

Here are examples of the names and missions for teams we've previously put forward for self-selection:

- *The buyer team:* Make the lives of our buyers easier. (Customer-focused team)
- *The fashion team:* Create an awesome experience for buying and selling clothes. (Product-focused team)
- *The iPad team:* Create a great user experience on the iPad. (Technology-focused team)
- *The operations team:* Make the lives of our internal operations and customer service teams nice and easy. (Business area–focused team)

Ideally we want teams that can maintain an end-to-end perspective and deliver to a customer-centric purpose that would yield great results for the company.

Additionally, we strongly advocate for granting teams the autonomy to update their team names at a later date. The names initially assigned during self-selection were provisional, reflecting the purpose, but we encouraged teams to change their names if they wished; even if they ultimately decided to stick with the suggested name, it was always their choice. Empowering teams with this decision-making authority aims to foster a heightened sense of ownership among team members.

Preselect Certain Roles

Given that our product owners possessed specialized knowledge, often with years of industry experience in specific business domains, we made the decision to preselect a product owner for each team. One part of the rationale behind this choice was to mitigate the risk of, for instance, encouraging a product owner with extensive experience in trading cars to transition to one of our real-estate teams.

Another pivotal factor influencing the decision to preselect product owners was their role in providing direction to the teams. This approach proved beneficial, as it ensured we had a knowledgeable individual available to answer questions at the self-selection event.

In contrast, Andy Kelk, the technology lead for the digital mailbox at Australian Post, took a slightly different approach. He opted to preselect not just the product owner but a pair consisting of product owner with a team facilitator before allowing the teams to self-select around both these two roles:

> *I think what was a really big benefit was having those (team facilitators) and product owners tied up from the start and having them as the real kernel of the team. Giving that team an identity was really, really important. We actually spent quite a bit of time trying to pair up those (team facilitators) and product owners. That in itself was a whole exercise, which required a lot of bravery from those people because they had to put themselves out there and choose each other and do a bit of a "speed date." That was a fairly confronting experience for them, but it really cemented those relationships, which meant that those teams had a kernel (to grow from).*

Ultimately, the decision of which roles, if any, to preassign is entirely up to you. However, we recommend minimizing pre-assignments outside of product ownership and facilitation roles to uphold the essence of self-selection.

Preselecting product owners has always been our default, but when preparing for a self-selection at a large financial SaaS company in New Zealand, David also remembers being asked a great question by a former product owner:

> *I remember getting a message from a product owner who was reviewing the plan for the upcoming self-selection. He asked directly, "Why do product owners not get to choose?" He went on to explain that while he understood the need for someone to own the team mission and vision, product owners, like anyone else, would value the opportunity to choose who they worked with. In particular, he was drawing on experience as a product owner working with people who he found incredibly difficult to deal with. The thought of those people being able to choose his team filled him with dread! It would be harder to remove this constraint on a larger self-selection, but because our upcoming event was only four teams in this instance, we were able to allow product owners themselves to also move freely during the selection (having completed their pitch for one of the teams but having acknowledged it might not be them leading the team later).*

Decide If You Will Start from Scratch

It's also crucial to determine whether your self-selection process will commence with empty teams or if individuals are already designated to work in specific areas, perhaps due to experience or specialized skills. If preselected individuals do exist, it's essential to visibly acknowledge this, as undisclosed arrangements could be perceived as favoritism or fake self-selection, jeopardizing the credibility of your event and the trust you're hoping to create.

Opting to start entirely from scratch, with completely empty teams, has significant advantages. It simplifies the process and presents a blank canvas for everyone involved. This approach can also reduce the complexity of the presented constraints, enabling participants to explore options they might not have considered otherwise.

Alternatively, you can commence a self-selection by displaying the current team structure (with photos starting off in circles which represent their current teams). It accommodates those who wish to remain in their current positions, providing a sense of stability and preventing any feeling of displacement. If you choose to start with the status quo, ensure clear visual indicators convey that individuals can move and haven't been preassigned or fixed into one team.

As a general rule, if this is your first self-selection, then start with blank circles. If this is your second or later self-selection, then start with your current team layouts and populated circles.

Step 5: Coordinate Logistics

Establishing early where and when your self-selection will take place can support your communication effort, build trust that it will actually happen, and give confidence to people that everything is indeed planned and under control.

You should define the following details as early as possible. *When* will your event take place? *Where* will it take place? *Who* will be there?

When Will Your Event Take Place?

It's a good idea to choose a date that's far enough in the future to give people time to get used to the idea but not so far out that it doesn't feel real. Consider also having a backup date in case of last-minute problems or illness/vacations for key people.

A sufficiently large company will always have people who are ill, traveling, on annual leave, or unable to attend for some reason, on whichever date you choose. Therefore, we recommend identifying key people up front—those without whom the event would be significantly compromised.

Following our first self-selection event, Sandy remembers:

> *If you have close to 150 participants, it's inevitable that some are going to be away. We didn't look out for our key people being away, and what happened to us was that one of the key influential people was not present on the day. This shouldn't have been a problem per se, but his peers started second-guessing him, and they started acting and thinking, "What do you think Peter would want us to do?" rather than choosing for themselves what they wanted to do. It's something we actually had to intervene in as facilitators during the day because people were slipping away from the principles of self-selection.*

Other companies have connected the self-selection to an existing event in the diary. A livestock company from Hamilton, New Zealand, chose to attach their self-selection event to their Product Increment planning.[6] Kristin Andersson, their agile coach at the time, explained to us what they did:

> *We used the SAFe framework, which means we already had significant time booked with people each quarter. We decided to run our self-selection just before the PI planning event. In fact, we carried out our self-selection two weeks before the planning, which gave us enough time to do everything we needed to do to get these teams working together at the start of the next quarter. We also told people they would have the chance to choose their team again at the next PI planning (three months later), but in actual fact we only saw very minimal movement second time around.*

6. https://scaledagileframework.com/pi-planning

Where Will Your Event Take Place?

If you're doing this in person (which is preferable if an in-person event is possible for your organization), you'll need a big, open collaborative area with lots of wall space to visualize the status of your teams and the progress of the self-selection process.

Go for the biggest space you can find and, if possible, run the event away from your normal office environment. This will help detach people from their current work and demands on their time, hopefully giving the necessary perspective to make the best possible decision.

If you're doing this remotely, setting up a well-designed online environment using a visual management tool (such as Miro or Mural) is important. Collect photographs of everyone involved, build the board, and use clear signposts to make it easy to use. All this is required to satisfy the need for clarity, which we stated earlier is one of the most important things to get right in your planning.

You can read more about the best possible remote or hybrid setup for your self-selection in Chapter 6, Running a Remote or Hybrid Self-Selection Event, on page 87.

Who Will Be Invited?

It's important to define up front who should take part in your self-selection. Is there any particular group that should be included or excluded? It's likely that most people to invite will be obvious, but others could sit in a gray area between being part of a team or part of the supporting cast. In our initial case study we had to make choices about operations, infrastructure, and data analytics specialists.

We recommend that you allow as many people to self-select as possible. If in doubt, include everyone who could be included in a team. This should give the best results for your organization and the most diverse teams. It will also send an important signal that the standard of trust and transparency applies to everyone.

We advise against inviting those who aren't directly involved in the work your teams will do (unless they are helping as facilitators). People often act differently when observers or their managers are present, so keep any observers to an absolute minimum. At a New Zealand bank, we once housed a self-selection in a room encased by glass walls. Managers, driven by a mix of curiosity and a desire to offer support, positioned themselves just beyond the glass. Their

presence, although well-meaning and fueled by excitement to be near the action, inadvertently swayed the participants. We noticed individuals casting glances toward their managers, gauging reactions as they navigated their choices—a subtle yet significant reminder of the nuanced dynamics at play in self-selection environments.

Anyone who will be helping you facilitate should be briefed on their roles and the kinds of questions they might be asked, and you should walk through how to respond in certain situations (such as if they see someone getting pressured to join a particular team).

Step 6: Communicate Early and Often

Communicating fully and correctly might be the single most important thing you can do to give your self-selection the best possible chance of success.

Self-selection may appear as a new and seemingly risky process to many individuals. While their initial reaction might be positive, a potential exists for a quick shift to fear and resistance when the event actually happens and they're faced with a choice. This fear could stem from the novelty and uncertainty of the process—fear of the unknown, apprehension about potential outcomes, concerns about collaborating with someone they might not get along with, or unease about being locked into a team without the flexibility to change later. Preempting these fears and uncertainties is important in your communication to foster a positive reception when the time comes.

In our experience, participants always have numerous questions. Engaging with your coworkers early allows you to surface these questions before the event, providing individualized answers and follow-up.

When we start communication about self-selection, we often find ourselves inundated with emails, meeting invites, and questions from various perspectives. In the initial stages, you might be fielding numerous what-if scenarios, but that just shows people are thinking through the idea and that they care.

We recommend taking the following steps (shown in the checklist on page 53) in your communication approach.

For our most significant self-selections, we initiate conversations with managers, particularly those we knew shared our confidence in peoples' ability to tackle a complex puzzle. With supportive management, you can set up an environment for success together. For anyone expressing dissent, lean into robust discussions to address fears, assumptions, or requests.

Once you have an initial group on your side, we recommend active communication with the broader organization and potential participants as soon as possible. The first communication might let them know what you are planning, followed by a much more detailed explanation that should include the team selection method (using self-selection of course!) and why you're opting for this approach.

COMMUNICATION CHECKLIST

- ☐ Talk to as many people as possible, before, during, and after the process.
- ☐ Actively listen to their concerns, acknowledge and record them.
- ☐ Be patient with participants as they work through their fears.
- ☐ Paint a very honest picture about the worst-case scenario, which is never as bad as people think.
- ☐ Talk to people individually and present to groups.
- ☐ Be clear about why we're doing this.

Consider presenting the self-selection plan to the entire company, and reinforce the ideas behind self-selection. Outline the problems you want to solve, the intended approach, and why you believe self-selection is the best option. Provide as much information as possible.

Make your presentations inspiring, emphasizing the privilege of being trusted with reshaping the company's team structure. Express confidence in people's ability to generate the best possible solution. Your presentations might generate questions from the audience; be open and honest about both your knowledge and your limitations. Maintain a positive, clear, and transparent approach when communicating what you do and don't know. You'll be amazed by the response.

What Next?

Now that you've learned how to do the necessary groundwork and move the big pieces into place, such as conducting a readiness check, getting permission, and communicating the concepts and plan, you're ready to move on to the next phase: preparing for the day of self-selection.

CHAPTER 4

Getting Ready

After you have the foundational elements in place for your self-selection event by conducting a readiness check, getting permission, and communicating the plan to your participants, you can move forward to focus on the final details of planning the self-selection. With several days still to go before you let people choose their own teams and their own work, you need to finalize the rules and constraints, devise your facilitation plan, write your FAQs, and organize your materials and boards. At the end of this chapter you'll be ready to go!

Step 1: Define the Rules and Constraints

Like anything in life, self-selection comes with rules and constraints, although we recommend keeping the number of self-imposed constraints to an absolute minimum. Preparing and confirming short and simple rules makes the problem of establishing new teams easier to solve for those involved. We believe that the more rules there are, the more complex (or even unsolvable) the puzzle can become.

The essence of self-selection is that you are entrusting people to solve a problem, which is why you need to make sure they have the freedom to do so within sensible boundaries. The right rules will provide the clarity people are craving, showing them exactly what you're asking from them and how they can "play" the game of self-selection.

Establish the Key Rules

We have only ever had the three rules outlined in the illustration on page 56 for the self-selections we've run, and we recommend you do the same.

ESTABLISH THE KEY RULES

- ☐ Teams have to be capable of delivering end to end.
- ☐ Teams have to be made up of three to nine people.
- ☐ People have to be on a single team.

Here's the reasoning behind our suggested three rules.

Keep Teams Autonomous

Teams have to be capable of delivering end to end.

You don't want to create a web of interdependencies. Teams are given autonomy, and you can't have autonomy unless people have the ability to do their work on their own. This means teams must have all the skills to work end to end. To become a self-sufficient unit, they can't be relying on lots of people outside the team. This simply means that they need people with all the skills (or the ability to learn these skills) to move from an idea to a shipped product or feature.

One exception to this rule is if your organization has designed its teams around the Team Topologies framework.[1] In this case, you may need to change or update this rule for your teams. If you have platform teams, for example, they may not be delivering end to end and they should be designed to deliver their work, whatever that looks like for them. As much as possible you're trying to minimize dependencies between teams, and regardless of the model that sits behind your team design, this idea should permeate through your design.

Keep Teams Small

Teams have to be made up of three to nine people.

Experience has shown us that smaller teams work best. This is a rule that appears to be true regardless of the selection method. The rule of three or more people for a team comes from the idea that while smaller is almost always better, two people is a pair and not really a team—so the minimum number of people on a team is three. We've also experienced universally that teams larger than nine become unwieldy and unproductive, and they often form subgroups that can introduce challenges and gaps.

1. https://teamtopologies.com

Agile experts often assert that teams should be made up of seven plus/minus two people;[2] and even within that rule we have a preference for even smaller teams where possible. This encourages cross-functional collaboration and supports the concept of members wearing different "hats" rather than only performing tasks within their respective professional fields (examples include testers doing business analysis and developers volunteering to test).

Small teams also make overall communication easier because of fewer communication paths between team members. In fact, the number of communication paths increases exponentially as the number of team members increases, and a team of 10 or more members tends to become unsustainable, creating the formation of smaller sub-teams.

We recommend that you set the maximum/minimum number of people as a clear constraint and allow the teams to work out how they'll fit within that constraint.

Keep Teams Together

People have to be on a single team.

Resist the temptation to split people across multiple teams. Having people part of one team is crucial, and though we've seen people try and rip their photo in two (or more) pieces to sit across multiple teams, this damages the team and the person as much as the photograph. We know from decades of research that multitasking and increased cognitive load are negatively correlated with performance, so give people the best chance of success by restricting them to join a single team. There tends to be one or two people who need to sit outside the teams to fulfill their role and to do the work they need to do. That's okay, but with your rules and constraints you can ensure this is an exception rather than the default.

In scenarios where people are divided among multiple teams, the challenge extends beyond multitasking. Often peak periods in both teams can overlap, which means that people split across teams face simultaneous intense demands. This not only places unfair pressure on them but also creates bottlenecks for the teams involved. As each team competes for the same person's availability, delays become inevitable, and no team receives the best possible contribution from the shared team member.

In our case, if people ask questions such as "Can we have half an extra person?" our answer is usually, "Absolutely, if you think that this is the best

2. http://www.infoq.com/news/2009/04/agile-optimal-team-size

available option and fits the constraint." As it turns out, those who have suggested 50 percent of a person's time have always withdrawn that suggestion when they considered how this would work in reality, namely with the person usually having to attend twice the number of team meetings and often becoming the bottleneck when several teams ask them to deliver work at the same time.

Don't Specify the Outcome Before You Start

We've frequently been asked (and always resisted) requests to specify up front the number of senior and/or junior members for each team. The intention of the request can be to ensure that the right amount of technical know-how is present and that there's an even distribution of the most experienced people across teams, which is fair. However, the addition of a constraint like one senior developer per team can have the unintended consequence of making the team selection puzzle unsolvable.

If you did choose to take this additional rule on board and specify, for example, one senior developer for every team, you could easily find out that you just don't have the right ratio in your organization to make that happen. This particular request also assumes that one senior person is interchangeable with another, which isn't true of senior developers any more than it is of any other role.

A director of engineering at an Asia-Pacific company shared that convincing stakeholders to allow a self-selection event with minimal rules about team composition required significant effort. Some stakeholders were concerned that without strict guidelines—such as requiring a mix of senior and junior members, ensuring a senior architect on each team, or having a feature expert—the teams might struggle to be effective. Interestingly, these concerns mostly came from individuals outside the teams. In contrast, team members, particularly those with experience in both effective and ineffective teams, had a solid understanding of what their team needed to succeed.

Not bowing to the pressure to add rules of this nature also prevents a highly undesirable outcome—that in which employees perceive that they've actually been selected into predefined allocations and it wasn't self-selection at all. It's our belief that the only thing worse than management selection is a stealth version of self-selection where people are led to believe they will self-select only to find out the decision wasn't theirs at all, that due to the rules and constraints, their new position was effectively preselected and they could only step into their pre-allocated slot.

Be careful of hidden or implicit constraints: if there's anything you absolutely can't live with, such as more than a certain number of people on a particular team, make it explicit. Sandy describes an interesting experience she had facilitating a self-selection event at a New Zealand bank:

> *We had a team that we were going to disestablish within the next 18 months, and the bank didn't want to budget more than three people on this team. We forgot to make this constraint explicit, probably because we thought very few people would choose this team anyway. Big mistake! Eight people wanted to be on the team, and we had to explain during the self-selection that an additional constraint applied on just this particular team. It didn't go down well, and we had to apologize for overlooking this. I think the main issue was that people thought that if there's one hidden constraint, how many others would there be? And if that's the case, is this really self-selection at all?*

Step 2: Create a Facilitation Plan

By now you should have a better idea of how the day of self-selection might pan out. It's time to ensure that you have a solid facilitation plan in place. People can react strangely to new levels of autonomy, and while we've never tried simply putting people into a room and hoping they sort it out, we're confident it would not create a great outcome or experience for anyone. As the facilitator, it's your job to provide the structure and boundaries for the event, and we highly recommend having a detailed plan for the day, with contingency plans included.

David describes how we came up with our first facilitation plan:

> *I remember standing in the Wellington Trade Me office overlooking the waterfront with a blank piece of paper. With a Sharpie in hand I said, "Well, we seem to have permission to do this now, or at least nobody is stopping us, but what are we actually going to do?" We looked at each other and said, "Um, I don't really know."*
>
> *Originally we considered whether coworkers would email us their top three choices for teams they wanted to join in advance. If we ranked them, we could assign points to them and assign people to teams in that way. But then we thought, is that actually self-selection, or are we just dressing up management selection differently and with more information? And wouldn't people's requests change when they saw what others had done or new opportunities opened up? We needed everyone to be directly involved in the process. After all, this really was all about them.*
>
> *So we started scribbling things down and tried to come up with some kind of supporting structure and process that would allow us to do this. We knew it would have to involve people being present and making choices alongside everyone else as opportunities developed. This would not be just another meeting!*

Over the years, we've honed our facilitation techniques to effectively guide groups through the iterative process of self-selection, drawing from both our own experiences and insights from others. Despite a decade of implementing self-selection across countries worldwide, the core process and principles we began with have remained unchanged.

From the very first self-selection event we were a part of, the high-level running order has usually followed these steps:

1. Welcome the participants and kick off the event.
2. Present the team missions and purpose.
3. Facilitate several rounds of self-selection (usually three to four timeboxes of 10 minutes), each followed by a period to pause and get feedback.
4. Wrap up, close the event, and clarify what will happen next.

Over time we've refined our facilitation techniques to guide groups through this iterative approach to self-selection and have incorporated learnings from our own experiences and those of others. The process of working through a facilitation plan will cement a lot of the ideas for you and help you identify any gaps that you should address.

Key Principle: Do What Is Best for Your Company

Our overarching principle, as opposed to an additional rule, is always "Do what is best for your company." It has proved incredibly important to have this as a principle, especially when problems or stalemates were encountered during the selection process itself. We usually display it prominently on a large banner in the front of the room, forming a constant visual reminder that we can refer to at any time during the self-selection process.

We do this because it's clear that while people have one decision to make—which team should I join today?—they choose or prioritize on at least three levels. They could optimize for their own personal preference (I really want to work on the new iPhone app); they can optimize for the good of a team (this team really needs my skills more than the other team I would prefer to work in); or they can optimize for the organization (I can see the organization has a need over here that's critical to keeping the business running, so I'm going to select to be over here).

Here we step into a crucial point around self-selection: a potentially hidden assumption that you might run into too. Self-selection is not about everyone doing whatever they like. We don't believe that's a recipe for a successful company. Instead, self-selection is about solving problems together; it's about compromises and trade-offs—with the key differentiating behavior being that the people involved in that compromise and who will feel the consequences actually make the decision. It's not done *to* them. Your self-selection is very unlikely to end with every single person sitting

where they *want* to be; instead, it should end with every single person sitting where they *need* to be, having been fully involved in the decision-making, trade-offs, and ultimate placement.

The reason for our banner, "Do what is best for your company," is to imply that without this level of abstraction and thinking, we might not have teams to select into unless we position ourselves and our teams in a way that is beneficial for the overall company. The visual reminder should help let people see that too.

Step 3: Prepare Frequently Asked Questions

Even after lots of conversations, emails, and presentations about the day, it's important to remind everyone of the details of the event, the reasoning behind it, and what to expect. We recommend collecting the most frequently asked questions and preparing a simple yet comprehensive FAQ sheet. It's a good way to make the details front of mind for participants.

Sample FAQs

Here are sample FAQs you can use or adapt for your self-selection:

Do I have to stay in my current team?

This really *is* self-selection. You don't have to stay where you are if you don't want to—although it's totally fine if you do! You choose!

What teams can I choose from?

Have a look at the list of all teams and think about things like these:

- What do I want to work on?
- Who do I want to work with?
- Where would I learn the most?
- Where would I be able to teach the most?
- What is best for the company?

When will I start working with my new team?

It's important to know that this reorganization won't be in place straight away; people have work to hand over and things to finish. We'll discuss dates with each team and then agree on a plan based on outstanding questions, issues, and current work. Hopefully the transition occurs sooner rather than later, but the timing is dependent on who chooses which team, so we can't predict that decision now.

Can I be in more than one team?

Our experience tells us that one team per person is best. It allows people to commit to their teammates and to the work, which means they're always available to their team. Exceptions to this occur, of course, and the decision is ultimately yours.

What should I do if I can't be there for the self-selection?

We would love for everyone to be there, but with this number of people it's inevitable that some won't be able to make it. If you can't be there, don't worry; you can either nominate a proxy (that is, someone you trust to whom you can explain what you would like to do) or you can let one of the facilitators know.

What about my current work/projects?

This is important and we'll account for this, but don't worry about it right now. We're defining a future state with self-selection. Once we know the team layout, we'll tackle your current workload.

How many test/design/development slots are there in each team?

We have a team "blueprint" that you might have seen, but this is a suggestion and *not* a strict layout. The exact requirements for each team will vary based on the work; but it's really up to the team to decide. Also, some teams might have no design requirements, for example, whereas others will have high needs. If in doubt, talk to the others in a team and the product owners.

I just want someone to tell me where to go. Can you just put me in a team?

We think *you* know more about what you should work on and who you should work with. If you're really unsure, you can select the "I have no team" section initially and then listen for issues and gaps to fill. We really don't want to select on your behalf; you'll make a better choice than we could.

How long will I be with my team? Am I signing my life away?

We want stable(ish) teams, but you aren't signing your life away. We'll review the lay of the land within three to six months and you'll have opportunities to move teams.

Where should I put my photo if I just don't know where to go?

Just choose the "I have no team" section (for now!)—that helps boost your visibility as a great potential addition for any other team.

What if someone else is already doing what I want to do?

If someone is already doing what you want to do, talk to that person and the rest of the team, and do this against a backdrop of finding the best solution for the company.

What happens next?

We'll arrange to sit down with each team to answer any questions, discuss issues, and define a plan for becoming a new team. That plan will involve a day when the team comes together again to decide how they'll work and which flavor of agile best suits their new team.

Step 4: Send Out Homework

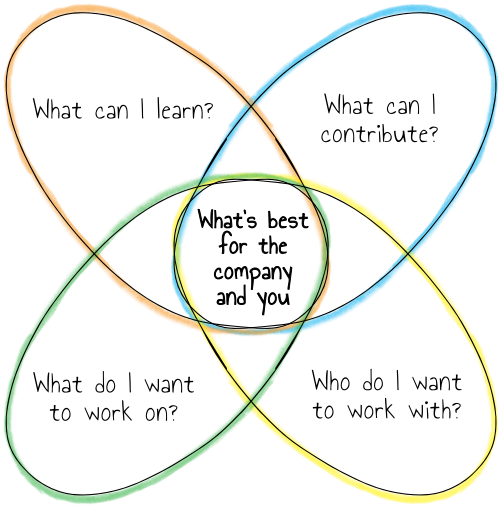
For every self-selection event, we ensure all participants are well prepared, regardless of their previous experience with self-selection. This preparation is especially important for newcomers or those who might feel unsure about the process. To facilitate informed decision-making, we provide detailed guidelines on how to choose a team effectively. Additionally, if there are several participants in a group who may not be well-acquainted with each other, we recommend everyone prepare profile cards that highlight their skills and interests.

Provide Participant Guidelines for Selecting a Team

Selecting the right team is crucial not only for the company's success but also for personal satisfaction and growth. Many participants wonder, "How do I choose the right team, and what criteria should I use?"

To address these questions, we advise participants to find a balance between the company's needs and their personal goals. To help them make good choices, we recommend they identify the sweet spot for team selection. The ideal point combines personal interests, motivation, and mastery, which includes the opportunity to both contribute and learn. Viktor Cessan, an organization and agile coach in Stockholm, came up with a way to visualize how someone should choose their team during self-selection, and with his permission we've re-created and adapted his idea in the illustration on page 64.

HOW TO CHOOSE MY TEAM AT SELF-SELECTION



We can distill the process of selecting the right team into four guiding questions for the participant:

What can I learn?

We are driven by the desire for mastery, to expand our skills and embrace new knowledge. While this doesn't need to happen every day, over time we should see personal and professional development. If we stop growing, we risk people becoming disengaged and dissatisfied. A useful approach is to aim to be the "least experienced person on the most skilled team that will have you." Why? Surrounding yourself with highly skilled individuals who perform at high levels normalizes such performance for you, pushing you to continuously improve.

What can I contribute?

This aspect connects to the previous idea of being the "least experienced person on a team that will accept you." It's important to consider what value you can bring to a team. Teams should welcome you for the skills and insights you offer, ensuring you're not just there to learn but also to contribute. If this balance is off, it may not only feel unfair to both you and the team, you also won't be happy in the long term. Nobody likes feeling like they're dead wood, and the feeling of not being good enough will ultimately grind you down and diminish your job satisfaction. It's about finding the sweet spot of stretching yourself to keep learning and providing enough value to deserve your spot on the team.

What do I want to work on?

We perform our best when we're engaged in work that feels meaningful. Ideally, your company's mission aligns with your values, which influenced your decision to join in the first place. During self-selection, ensure the team's purpose resonates with you and contributes to the company's overarching goals. Inspiration often deepens as you understand more about the customers and context.

Who do I want to work with?

Almost no one in modern work life can achieve real outcomes without a team, and achieving things together is both fulfilling and fun. A great team is so much more than the sum of its parts and requires the right skills, attitudes, levels of diversity, and psychological safety. So don't base your choice on who your friends are and who you'd like to have a drink with. Base it on who you think would make a winning combination. Contrary to what many people think, it's not a prerequisite to be friends to make a great team. Trust, safety, respect, and shared values are a lot more important. Make your choice dependent on who you are willing to invest time and effort in to build a great team.

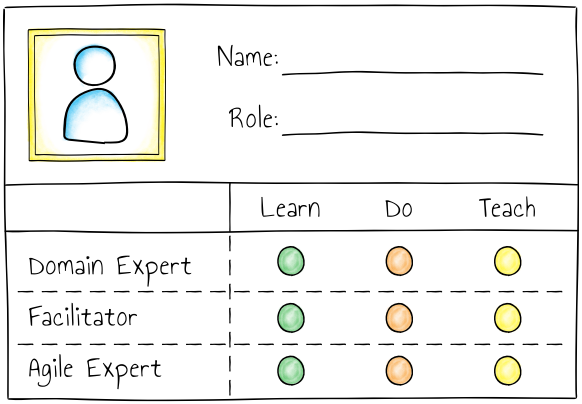
We found that sharing the previous guidelines prior to self-selection events was useful to help people realize that several teams actually ticked their boxes. "Come to think of it, many teams are actually appealing," we hear time and again.

Ask Participants to Fill In Skills Cards

In preparation for the self-selection event, it's often beneficial to have participants come prepared with a skills card. A *skills card* is a simple but effective tool that prompts individuals to document their current skills and desires. It also asks them to consider skills they wish to develop, what they are capable of teaching others, and their absolute no-gos. This exercise not only provides valuable information on the day of the event but also encourages participants to reflect on their professional desires, dislikes, boundaries, and preferred working styles.

For instance, consider a skills card designed with a "learn, do, teach" structure, as shown in the illustration on page 66.

This card might detail an individual's existing technical skills in software development and a keen interest in learning project management.



Alternatively, another card might adopt a format that includes personality traits, skills, product expertise, and any no-go areas. For example, it could emphasize strong design skills, a desire to develop data analysis capabilities, proven experience in user experience, and a preference to avoid full-time on-site work.

Step 5: Prepare Materials and Stationery

Self-selection needs to be an interactive and visual event where everyone can see what's going on and actively participate throughout the process. Clarity for participants is one of the key things you want to get right throughout. The checklist on page 67 outlines the suggested materials you should have on the day (based on doing the event in person). If you're running a remote or hybrid event, you'll need to replicate each of these items in the virtual world.

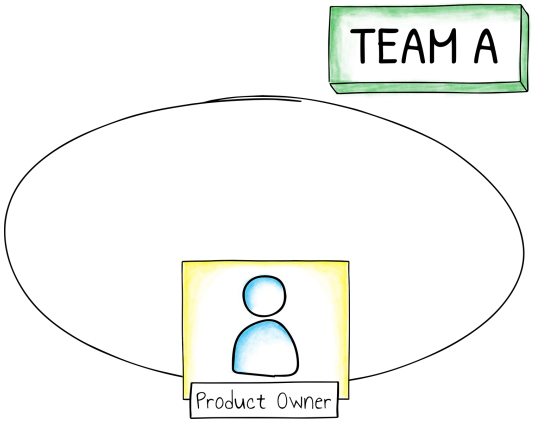
Empty Team Diagrams

You'll need an empty team diagram for each of the teams you want to create. As part of your planning for Step 4 in Chapter 3 on page 45, you will have defined the desired teams, and now it's simply a case of creating the spaces so they can be highly visible to people showing up to self-select. The idea behind this is to have participants select by adding their photos to team diagrams on the wall. That way you can build a live picture as the self-selection process progresses.

MATERIALS YOU WILL NEED

- ☐ Team Diagrams For The Wall
- ☐ Photographs Of The Participants
- ☐ Skills Checklist
- ☐ A List Of Rules And Constraints
- ☐ "Do What Is Best For Your Company" Banner
- ☐ Descriptions Of Key Roles
- ☐ Colored Sticky Notes To Show Skill Sets
- ☐ A Big Timer
- ☐ Printouts Of Your FAQs
- ☐ Team Mission/Purpose Statements

This image below shows the layout of an empty team diagram. As you can see, the team space is simply a large circular shape. As straightforward as this looks, a fair amount of thought had gone into the layout. For example, the shape itself fits a maximum of nine photographs (including the product owner), which corresponds to the constraint that teams should be no more than nine people. A prominent title is at the top of the sheet to enable everyone to see each team at one glance—something which becomes increasingly important, the more teams being selected in one event.



The product owner's picture is positioned on the bottom and not at the top. This was done to ensure we didn't inadvertently imply a hierarchy within the teams. The product owner is simply the person with the business knowledge on the team and not the only leader. That person's picture is also taped onto the sheet to make it permanent because the product owner in this case had been preselected and was unlikely to change. For remote selections, this might be one element to lock on your visual board.

It's also a good idea to prepare a separate team sheet with the title "Not in a Team Yet" or "Available to Help." This is for those who don't know where to go initially. They can put their photos there to demonstrate to others that they're available for selection. This mitigates the risk of anyone hiding in the corner and being missed or inadvertently bypassing the process.

Photographs of Participants

Provide a photo of everyone involved in the self-selection event. Ideally, the photos should be easily recognizable from a distance and the right size to match your team sheets. We've learned that things go much more quickly when you can easily see the status of each team and who's in it.

Be aware that preparing these photos can take some time if your event involves a lot of people. In large-scale self-selections of 100 people or more, it can take hours to print and cut out photos, and we believe that level of effort and organization pays off. Also, be sure that no participant's photo is forgotten. Missing a few photographs may seem trivial, but not if it happens to be yours; it can make the person whose photo is missing feel neglected and unimportant.

Skills Stickers

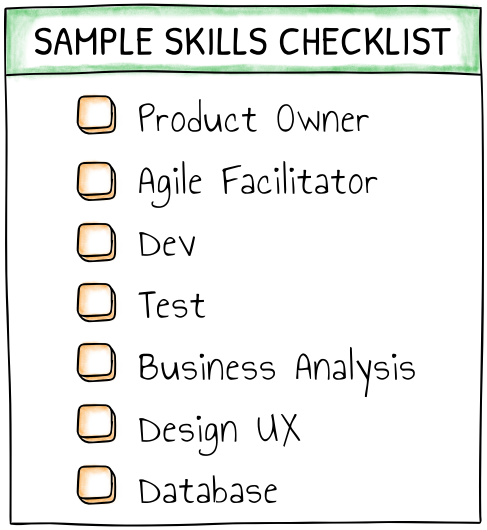
Skills stickers provide an easy way for people to discuss whether their team has all the necessary skills and has a status of "ready." To facilitate this conversation, provide color-coded notes for people to indicate their skills. The intention is that they can put the notes on (or around) their photo to display which skills they can cover for a team.

For example blue could be development, yellow for test, dark pink for business analysis. Don't get hung up on the actual colors—they're just a quick visual cue about each person's main skill(s) and are useful to surface shortages and surpluses. Because each team will have different skill needs depending on its purpose and technology, it's important to emphasize that the stickies visualize skills, not roles. It's also important to encourage people to use more than one sticky for their photo if they can contribute more than one skill. The

stickers can be added to the team posters at any point but are most commonly used during self-selection iterations, when teams are evaluating their composition and completeness.

Skills Checklists

At the bottom of each team sheet should be several check boxes for the team's aggregated skills coverage. Their purpose is to give each team the opportunity to collectively assess any potential skills gap, indicating and visually displaying whether or not a team has the skills they'll need. Without this, it can be difficult to quickly assess a team's readiness when people are moving in and out during the self-selection event. The following illustration is a sample skills checklist that can be displayed at the bottom of the team sheets.



For each skill, the team uses a check mark (skill is covered), an X (skill is not adequately covered), or N/A (not applicable, that is, not needed for this team) to designate its current status. Needs differ for each team, and not all teams need all skills (for example, an infrastructure team might not require any front-end design skill).

Make sure you have enough of these little strips to use a fresh one for each team and change it after each self-selection iteration. We recommend printing enough for four to five rounds per team to be safe. If you're doing this remotely or as a hybrid, you can quickly update the screen, of course, without the need for multiple versions.

List of Constraints

Print several copies of your constraints (see our example constraints in the figure below) to display around the room. They will be a healthy reminder of the boundaries during the event.

A FULLY FORMED TEAM IS...

- Capable Of Delivering End To End
- Seven People (+/- Two) - Think Skills Not Roles
- Colocated

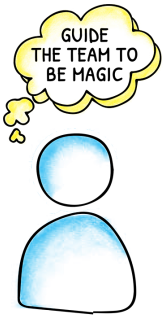
Role Posters

If you're introducing new roles as part of your self-selection event, it's a good idea to create role description posters in addition to all the other communication you do about these roles. Bring your posters to the self-selection event so that people can have a quick refresher. In our case we found it especially useful to have the role of the agile team facilitators visibly displayed on the walls because participants needed to be clear about the expectations if they were to put up their hand to take on the role in a team.

Following are the two main role posters from past self-selections, which were displayed around the office during (and after) the selection.

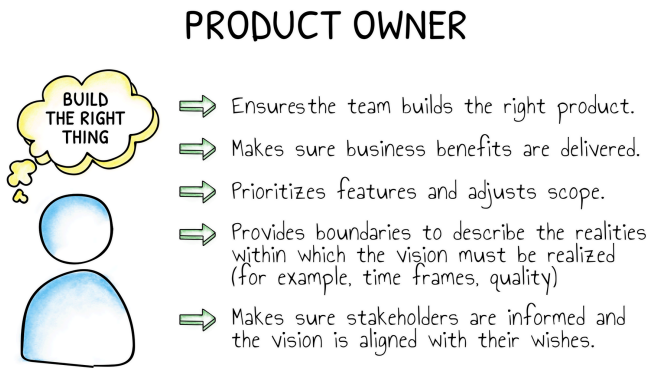
First is the poster for the agile team facilitator role (which is similar to a scrum master but edited for anyone who may choose not to use scrum):

AGILE FACILITATOR



- Makes sure the team is running an awesome agile development process.
- Assists team members in adopting and using agile.
- Helps the team work in the best possible way.
- Protects the team from disturbance and external threats.
- Is not a project manager but a servant leader with no formal authority.

Next is the role poster for the product owner role, which may be new to people who haven't worked on an agile team before, or be a unique take on the role for your organization:



The day before each self-selection, spend time ensuring you have all the materials you need. It can be fun to cut out photographs of everyone involved, prepare the color coding and checklists, and compile large team diagrams prepopulated with any information you already have, such as team names and product owner photos.

If your organization operates under a remote or hybrid model, you can read more about the adaptations you need to make in Chapter 6, Running a Remote or Hybrid Self-Selection Event, on page 87.

What Next?

This chapter outlined everything you'll need to do in preparation for your self-selection. You may have slightly different skill requirements or constraints for your teams, and it's up to you to finalize your bespoke requirements. Running through this level of preparation should put your mind at ease, knowing that you'll walk into your self-selection fully prepared and ready for almost any scenario that might arise.

Next we move on to the event itself, looking at the iterative process in detail and explaining the timing and facilitation needed on the big day.

CHAPTER 5

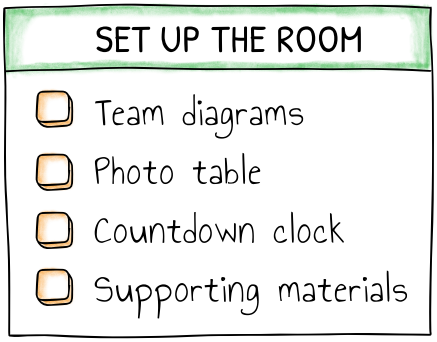
Running a Self-Selection Event

Now that you've done the work and meticulous preparation required before you shout "Go!" and let your teams self-select, you're ready to do it! In this chapter, we walk through the 10 steps involved in running a self-selection event. These steps should form the basis of your facilitation plan. We cover exactly what you need to know about creating a collaborative environment, setting the context, and running self-selection iterations. By the end of this chapter, you'll be in a perfect position to run a self-selection.

Step 1: Set Up the Room

The first step is to set up the room where your event will take place. Get to your venue early so that you have ample time to set up. If you're an experienced facilitator, you'll be used to arriving early to ensure that the environment is expertly adjusted to give you the best chance of success. If any problems do emerge, you're going to solve them before your participants arrive. Make sure all your papers, photographs, and materials are set out to create an impressive entrance for those that arrive to pick their team later that day.

Refer to the materials checklist on page 67 for a reminder of what to bring, and make sure the items shown in the checklist on page 74 are set up and ready to go.



Team Diagrams

Display your empty team diagrams on the walls. These diagrams will form the keystone to your event: everything else you do during the day is about populating these diagrams in the best possible way. As we described in Empty Team Diagrams on page 66, team diagrams are the empty circular placeholders for each of the teams you want to create through self-selection.

If you're in the same physical location, make sure that the team diagrams are positioned so that people can physically move to add their photo and join a team. Movement is key to energize the people involved and to make it easier to see who has chosen which team just by looking at where they stand.

If you have teams grouped into tribes or business units, those team sheets should be placed close to each other.

The larger your overall number of participants, the more consideration you'll need to give to the placement of your team diagrams. And don't forget to have a "Not in a Team Yet" diagram, as described on page 68. This designation is useful for people who want to highlight that they are available for selection and want to be approached. Place this diagram as centrally as possible to prevent people feeling like an afterthought or excluded from where the action is taking place.

Photo Table

Lay out everyone's photograph on a table so that participants can pick theirs up as they walk in. This is an important step in making everyone feel welcome. It also ensures that people actively take part in the event by moving their own photograph around.

It's also a good idea to place a stack of printed FAQ sheets next to the photo table. See the Sample FAQs on page 61 for an example sheet, but you should create one that suits your context.

Also important: don't forget to double-check that you have everyone's photo. Don't start the day on the back foot before you even begin.

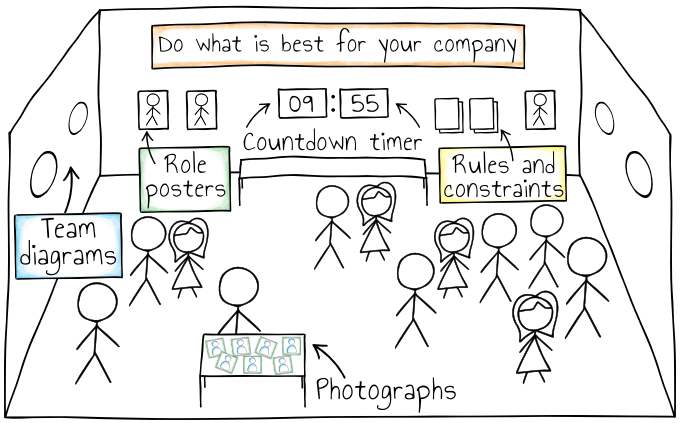
Countdown Clock

Project a large countdown clock or timer onto the wall so that people can easily see the self-selection timeboxes. A big timer sets the expectation that things will flow and contributes to a sense of urgency. Google has a simple but excellent free timer available (search for "timer" or "countdown clock").

Supporting Materials

An important visual reminder should come in the form of a prominently displayed banner with the words "Do what is best for (Your Company)." This visual can provide the right backdrop for the event and remind participants that this is not about everyone doing what they want, but more about using our collective brains to solve problems together.

Here's an example layout of a self-selection room:



Step 2: Welcome People as They Arrive

Greet participants as they arrive and ask them to grab a FAQ sheet and write their name on their photo. In larger, newer groups or in a fast-growing environment, adding names is important for what will follow. This first interaction of finding their photo and writing their name can be important because it actively involves everyone in the process from the very first moment.

Are the Right People Present?

Before kicking off, check that the right people are in the room. Is anyone missing? Is anyone present who shouldn't be? An event like this can act as a magnet for people who aren't participating but are interested in the result or simply like to observe. We advise you to politely ask anyone to leave who isn't directly involved in your self-selection as a team member or a facilitator. This is important because people will often act differently in the presence of those who appear to have power and influence (this is commonly known as the Hawthorne effect[a] and is a well-researched and impactful aspect of human behavior). Check out Who Will Be Invited? on page 51 for who you should invite and who you should not invite.

a. https://www.investopedia.com/terms/h/hawthorne-effect.asp

Step 3: Introduce the Day

This is the part when you step in front of the group, make everyone feel welcome, and set the context for the day. Your job is to make people feel safe about the choices they'll make and provide a clear understanding about the rules and constraints in which they'll make decisions. Get ready to reiterate the purpose and desired outcomes and to introduce the plan for the day. Some companies choose to start the day with an energizing activity or speaker to build the energy in the room.

The image on page 77 is a sample agenda for an event with 70 to 100 people. If you have more or fewer participants, you should adapt your times accordingly.

Here's what you need to cover:

- Thank everyone for their time and openness to participate in the event.
- Reemphasize the purpose of the day: to form a number of teams that are capable of delivering great solutions to their customers.
- Reiterate why you and your company believe that self-selection is the best way to choose teams. Express your confidence in their ability to come up with the best solution to a complex puzzle.
- Go through the agenda for the day.
- Remind participants of the answers to the most commonly asked questions. Talk about anything from the FAQs that is relevant or timely.
- Let everyone know your expectations. If your self-selection is more than 50 people, it's unlikely that all of the desired teams will be fully formed

today, and that's okay. Let the group know what success looks like by describing acceptable, desirable, and ideal outcomes.

- Explain what will happen if self-selection doesn't bring about a desired result. Will you go back to managerial selection or try another approach?
- Ask whether anyone has any questions. Answer them if they do, even if you need to say you "don't know but trust the process to bring about the right results."
- Express trust and confidence in people, the process, and the principle of letting people choose their own team and work.
- Tell everyone to get ready for the next item on the agenda: the product-owner pitches.

SELF-SELECTION TIMINGS (SAMPLE)	
1. Set up the room	30-60 mins
2. welcome	5 mins
3. Introduce the day	10 mins
4. Product owner pitches	30-45 mins
Break	
5. Self-selection round 1	15 mins
6. Self-selection round 2	15 mins
7. Self-selection round 3	15 mins
Break	
8. More self-selection rounds	30-60 mins
9. Define next steps	5 mins
10. Questions then close	5 mins

Step 4: Product Owners Pitch

The participants of your self-selection event need to know what they'll be signing up for. They need answers to questions such as these:

- What type of work will the team be doing?
- What is the team's purpose and mission?
- Who are the primary customers of this team?
- What will the technical focus be?

It's important for people to make an informed decision and to have the opportunity to help the company solve customer problems in an area they're most passionate about. The best person to introduce a team's purpose and direction is the product owner, as discussed in Establish Team Names and Missions on page 47.

A good product-owner pitch should explain the purpose of the team and the type of things members will work on. Here's an example:

> *We are going to be the Seller team. Our focus will be to make the sales process on our site easy and delightful. We will take care of anything our sellers want, and we will be driven by the wishes of our five major accounts. The work will be pretty, front-end design stuff with a fast turnaround time.*

If work is underway, this should be explained too. Remember to make potential team members aware that this work will finish and that choosing a team is a longer-term commitment beyond the scope of just the current project.

Those who are new to the organization may find it hard to remember the details of the pitches. If you have a lot of new people, as is often the case in a rapidly growing organization, provide a printed version of the product owner presentations.

A good pitch might last 5 to 10 minutes. Avoid the understandable tendency to want to pitch for a long time—if you have lots of teams in your self-selection, then this would unnecessarily blow out your timing. Product owners need to stay high level and answer more detailed questions when they are standing next to their team diagram slightly later in the day; those detailed questions and answers will only be relevant to a small subset of your overall group.

Step 5: Explain the Rules

You're almost ready to go. Now you need to explain the rules and detailed instructions for the self-selection iterations. Start by reiterating what you're looking for in a "complete" team, and remind everyone of the constraints you've defined for forming teams.

As mentioned in Establish the Key Rules on page 55, the fewer constraints the better. The following have proven successful:

1. Teams have to be capable of delivering end to end.
2. Teams have to be made up of three to nine people.
3. Teams have to be colocated.

Point to the information prominently displayed on the wall. Then explain the room layout, including the team diagrams, timer, role posters, and company banner. Next, guide participants through the instructions:

- The iterations will be 10 minutes in duration.
- When you hear the word "Go!" place your photo in the diagram of the team you'd like to work in.
- Discuss with the other people in your chosen team whether the team has the right skills and is fully formed—that is, it can do great work within the constraints.
- If the team doesn't have the right skills or otherwise isn't fully formed, have a conversation with people from other teams and see if you can solve the problem together.
- During the last minute of the 10-minute timebox, each team should complete the skills checklist (as shown on page 69).
- After each iteration will be real-time feedback to the room, and someone will need to speak for each team.

Explain that there will be as many iterations as needed to achieve the best possible result and that we don't expect everything to fall into place during the first round.

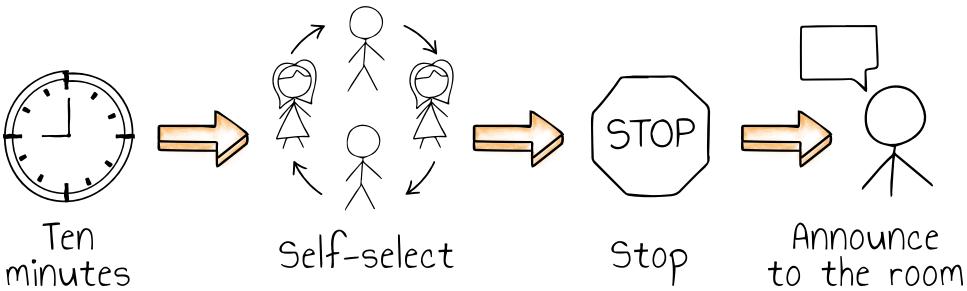
Step 6: Get Started: One, Two, Three, Go!

Start the 10-minute timer and kick off the self-selection by shouting "Go!" On your "Go!" people should start walking around and talking to product owners (and each other) while considering which team they want to join. To choose a team they simply stick their photo in the corresponding team circle. Initially, movement might be slow as people watch others around them, perhaps to see who moves first, but they should start to discuss their team choices and move around.

Ten minutes might feel short, but it encourages a first iteration. The first iteration will almost certainly not be complete, but it starts the ball moving toward a successful outcome. When the timebox is complete, be strict about stopping for a checkpoint and feedback. We recommend each iteration last for no more than 10 minutes. This is enough time for participants to have the conversations they need and to overcome any nerves about moving or selecting a team.

Step 7: Conduct a Checkpoint Review

At the end of each timebox, conduct a checkpoint to assess the status of each team. When the 10 minutes are up, have each team evaluate themselves against the skills checklist and then indicate to the room whether they have all the skills needed or are over- or undersubscribed in any area. To conduct these checkpoints, we've found the following pattern to be effective:



For the first checkpoint, don't expect fully formed teams—it's normal to have empty teams or people still unassigned. The checkpoint helps set up constructive conversations for the next iteration.

Each team should appoint a spokesperson to report:

- Is the team fully formed?
- Are there any gaps in the team?
- Have any problems or blocks emerged?

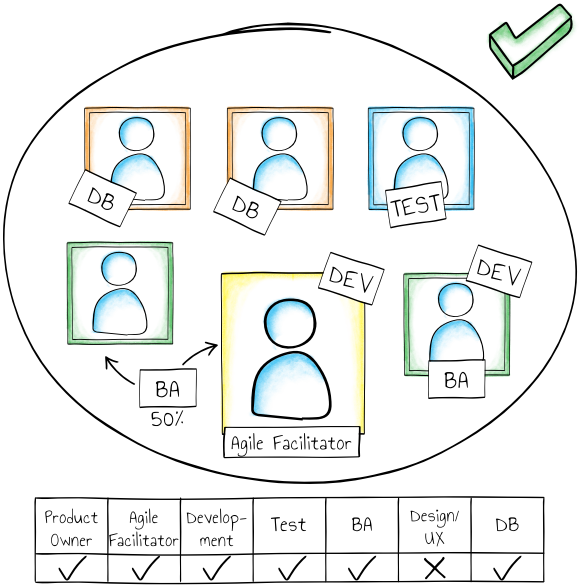
Team announcements often sound like these:

> *This is Matt from the Seller team. We currently have too many developers, not enough testers, and no design skills yet.*
>
> *Brian from the Search team here. We don't have enough developers. We have too many testers, and we have four designers.*

Any team that is fully formed receives a check mark of approval, as shown in the figure on page 81.

Members of your early approved teams remain in the room and still take part in subsequent self-selection iterations. The composition of the fully formed teams might still have to change to make the bigger picture work.

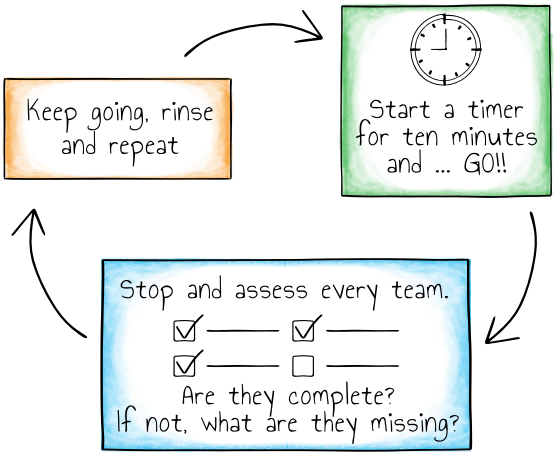
Try to move through each timebox and checkpoint as smoothly as possible so that you can start each subsequent round while you have the momentum and attention of the room. In some cases, the most interesting conversations may only have just started when the timer sounded to cut people off. So



having checked in on the bigger picture, focus on getting on with it and giving people the space to solve problems.

Step 8: Rinse and Repeat

Continue with the 10-minute timeboxes, each followed by a checkpoint for feedback, until all of your teams are fully formed or progress stalls. (See the following illustration.) Avoid extending the timebox, as this can be a slippery slope to losing the efficiency of short cycles, but you may sometimes shorten it if discussions slow down or participants seem distracted.



Facilitation

As a facilitator, resist solving problems or guiding people toward specific solutions. Ask open-ended questions and offer options, but remember that the team design *must* come from the participants themselves, not you. This is why managers who are not directly involved in team work shouldn't be present, as their influence would undermine the self-selection process.

Stay alert for signs that self-selection isn't happening organically. In one of our larger events, we had to intervene when a team lead started directing people into teams based on his judgment of skills and seniority.

Sandy recalls:

> *During one of our largest self-selections, a Business Analyst team lead was directing people toward specific teams, trying to ensure the "right" person with the "right" skills joined the "right" team. His efforts bordered on coercion, so we stepped in immediately to place the decision-making ability back in the hands of participants. The primary job as facilitators is to ensure that self-selection is truly self-driven, free from managerial influence.*

When to Stop?

You might arrive at a point where more iterations won't be helpful. Stop when you have all the teams you need—in which case congratulations are in order!—or if the problem isn't solved and engagement levels start dropping and you need to change tactics. In that case, it's time to switch gears, tackle the outstanding issues, and tweak the format.

David recalls:

> *Before self-selection day, we wondered how we'd know when to stop. We aimed for at least 11 teams, knowing 5 would be good and 7 even better. But when should we stop during the day? It turned out to be easy to recognize at the time. When people started chatting about unrelated topics like the weather or coffee, we knew it was time to stop and look at things differently.*

It Takes Three Rounds

In our experience, it takes about three rounds of 10-minute timeboxes for participants to fully grasp the self-selection process and reach a viable solution.

Round 1: Typically, the first round isn't very successful. Few fully formed teams emerge, with many over- or undersubscribed teams. Don't be disappointed if this happens to you; instead, celebrate the progress and get ready for round 2.

Round 2: Improvement usually begins to show in the second round, with more fully formed teams, though some problems, imbalances, and gaps will almost certainly remain. Sometimes things even get worse before they get better.

Round 3: By the third round, participants fully understand the process, leading to productive negotiations, team lobbying, and adjustments as teams often finalize their compositions.

Three rounds does seem to be the magic number. It's not 100 percent true, but certainly more often than not three rounds will be the number of timeboxes required to take the selection to a successful endpoint.

Step 9: Tackle the Outstanding Problems

A point may come in self-selection, often after three or even four rounds, where progress stalls. Most teams may be complete, but perhaps one or two are struggling and the answer(s) aren't obvious. This might be the time to change tactics, define the problems that have emerged, and start to lean into the hard stuff.

Here are a few options:

1. *Stop and call it a day. Accept what you've achieved as a win and solve the remaining issues later with a smaller group.*

   As part of one event, it took a night of reflection for someone to realize that switching one person between teams could actually resolve a range of problems—something that wasn't obvious during the event. It wasn't that person's first-choice team, but it was best for the teams and the company. It took that person compromising their own preference to solve the bigger problem, and therein lies the secret of self-selection. While everyone might not get what they want, they are actively involved in the decision-making; any compromises are theirs and not imposed upon them from above.

2. *Zoom in on your problems. Send people who are part of a fully formed team away. Reducing the number of people involved lets you focus on creating the remaining teams.*

   Sometimes when teams aren't fully formed, the problem is easily identified and the solution is clear. However, the problem can also seem unsolvable or have too many negative consequences. Reducing the number of people, visualizing the problem, and playing out scenarios is your go-to facilitation technique at this point. Though things might be feeling hard because you've been working on this for a while now, don't give up. You're at the

heart of the most important problems to solve. You may have known about these problems beforehand, or they may have emerged during the process. Try and focus on specific problems with fewer people if you can.

3. *Add imaginary people. Introduce "hire cards" and subsequently allow people to hire into their teams after the event.*

   During one self-selection event, we had a particular shortage of designers. No matter how we cut the problem up, we just couldn't make more fully formed teams with the people we had available. We could have thinly spread our designers across multiple teams of course, but that would have left every team short and no one happy. As a group we decided instead to populate as many full teams as we could and then use empty cards to represent the people we needed to hire after the event. This is a case where self-selection hadn't so much solved our problems as highlighted our current bottlenecks. This is a great side effect of self-selection, and while we never said it would solve all your problems, it will certainly shine a light on them.

4. *Be creative and avoid reverting to managerial selection.*

   When it comes down to the final stages of self-selection, important moments can arise as participants grapple with making those last crucial decisions. We've certainly witnessed situations where everything hinges on a single choice—one person deciding between two teams or a couple of individuals faced with selecting between one preferred and a less-preferred team. In these moments, someone often needs to make a sacrifice and take one for the team. It might even seem tempting to revert to managerial selection for this tie-breaker decision, but doing so would risk undermining all the progress made and imply that only managers can resolve such dilemmas. Instead, embracing more creative solutions can lead to far better outcomes. Willem-Jan Ageling from the Netherlands shared a memorable example from his time facilitating self-selection at a large financial institution. During one particular event, they reached a point where nearly all teams were complete, but two participants were still torn between joining Team A or Team B. Despite multiple rounds of discussion, the stalemate persisted. Rather than defaulting to a top-down decision, they opted for a playful yet fair resolution: they flipped a coin. "It felt strange," Willem-Jan admitted, "but everyone agreed it was fairer than having management step in. We worried that the person who lost the toss might be upset, but they left understanding completely and having been part of the decision-making process. They had witnessed the entire process unfold transparently and appreciated that it was a collective decision." This story highlights how,

even in tense situations, self-selection can inspire inventive and equitable solutions. By resisting top-down intervention and empowering participants to resolve issues themselves, you uphold the core principles of self-selection, strengthen trust, and preserve the integrity of the process.

Try to create as many fully formed teams as possible—8 fully formed teams are a better result than 10 teams that are 90 percent complete.

A Lens Over Your People

People say agile puts a lens over your business. In the same way, self-selection can put a lens over your teams, showing what skills you have too much and too little of. While this can sometimes be uncomfortable, it's always great information to have.

We recommend pressing ahead as much as possible while you have momentum and the right people in the room. Just continue to make sure that all decisions are really made by the group and not by you or any of the other facilitators.

Step 10: Wrap Up

Ideally, after three-ish rounds of self-selection you'll have populated your new teams. Hopefully everyone has had a positive experience too.

End your self-selection event by thanking people for their time and effort and congratulating them on the results. Explain to everyone that you will document the newly formed teams and that you'll be in touch about what's going to happen next. Let everyone know when they can expect the new teams to start.

Remember to take pictures of every team diagram, including check marks of completeness and a record of any problems that remain to be solved. You'll need them to inform not only everyone who participated but also people who didn't participate in the event and will be interested in the outcome, such as any managers you kicked out of the room or asked not to come!

What Next?

This chapter provided a step-by-step guide for how to run your self-selection event. You now have a facilitation guide to follow with everything you need to know to run a successful event. You learned about preparing the physical environment, setting the context for the day, running timed iterations, and collecting real-time feedback during checkpoints. You also received advice for when to stop running more iterations, and we provided you with options for how to tackle any outstanding problems.

Now that you've seen the core elements of running a self-selection event, it's time to consider a new layer of complexity: virtual and hybrid environments. With teams increasingly distributed, the traditional setup may not always be possible, but self-selection can still thrive with the right adaptations. In the next chapter, we'll explore how to bring self-selection to life remotely or with a mix of in-person and virtual participants. You'll discover tools and techniques that ensure every team member is fully engaged, regardless of their location. Get ready to make self-selection work wherever your team is based.

CHAPTER 6

Running a Remote or Hybrid Self-Selection Event

You might be wondering, *how does self-selection work in a remote or hybrid setting?* The core principles remain the same, but when the environment shifts, so must your approach. Remote and hybrid setups bring new challenges, such as keeping communication clear and collaboration seamless—but they also offer fresh opportunities.

When it comes to remote facilitation, all participants join virtually. In hybrid facilitation, you'll juggle both in-person and online attendees—even just one virtual participant turns the event into a hybrid meeting. So how do you ensure everyone is fully engaged, no matter where they are?

This chapter is your guide to adapting self-selection to these new conditions. We'll walk you through practical strategies, share success stories, and introduce you to the right tools to make the process as smooth and engaging as an in-person event—maybe even better. Whether you're managing a fully remote team or a blend of on-site and virtual participants, the key is using technology and facilitation techniques that create the environment for your teams to thrive. Let's dive in and explore how to make your next self-selection event a success, wherever your people are.

Adapting to Remote and Hybrid Settings

The shift to remote and hybrid work, accelerated by the COVID-19 pandemic, has fundamentally changed how we view the workplace. Technological advancements have made remote work far more viable, breaking down geographical barriers and increasing demand for flexible work arrangements. While self-selection and remote work may seem like two challenging concepts

to integrate, their underlying values align incredibly well. *Trusting people to do what is right without oversight, with no manager on their shoulder telling them what to do* could apply equally to self-selection and working remotely.

Another parallel between self-selection and remote and hybrid ways of working is that both involve breaking free from perceived constraints that we once accepted as absolute truths. Just as in this book we are challenging the old notion that managers must be the ones to select teams, we're now equally ready to discard the old belief that people need to work from a fixed desk in an office alongside their colleagues at all times. The combined power of challenging these assumptions at the same time can lead to extraordinary results for your people.

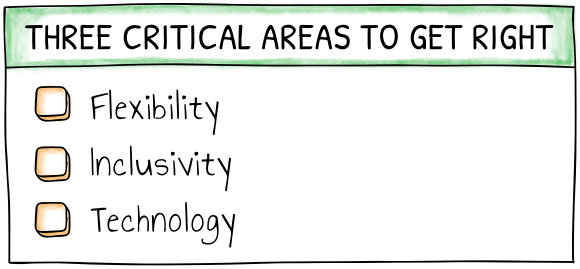
One of only three constraints we imposed on our self-selecting teams back in 2013 was that teams must be colocated. At the time, this was accepted wisdom and, indeed, you'll see that constraint referenced earlier in this book still today, but while colocation might be a preference for some, working remotely is a reality for most people today, and we now know that adaptation is needed.

Gathering everyone in the same physical space for self-selection may no longer be feasible or even desirable. Adapting self-selection for remote or hybrid environments requires thoughtful use of tools and practices to support the effective communication and decision-making that are critical to success.

To help ensure a successful remote or hybrid self-selection event, organizations need a strategy that includes careful planning, engaging online interactions, and excellent technology choices. By focusing on these areas, organizations can make sure their self-selection process is effective and efficient, no matter where in the world they are. Without the need for travel (and the environmental footprint that comes with it) and perhaps now having the luxury of including people who wouldn't usually be able to join, you can not just meet but exceed expectations with your event.

Three Critical Areas to Get Right

To successfully adapt self-selection for remote and hybrid settings, your attention needs to focus on the three critical areas outlined in the figure on page 89: flexibility, inclusivity, and technology. Let's look at these in more detail.



Flexibility

Flexibility in your approach means accommodating different time zones and environments of your team members. The communication methods and decision-making processes you choose must prevent individuals in different time zones or locations being disadvantaged.

Navigating time-zone differences poses a significant challenge in scheduling an event. To navigate this challenge, one effective approach is to adopt a "follow the sun" scheduling model. This method involves scheduling at times when the overlap between time zones is at its maximum, ideally ensuring that no participant has to attend when they should be sleeping. However, we acknowledge that this is not always possible. We have facilitated in the early morning and late at night to accommodate for people to join simultaneously from New Zealand, the United States, and Europe. If someone does have to make a timing compromise, just make sure they don't have to the next time.

Demonstrating your flexibility by prerecording certain sessions like the product-owner pitches or the introductory self-selection framing (including things like the purpose and ground rules) for those who cannot attend in real time is also a good idea. Then, using asynchronous communication platforms (such as Slack[1] or Microsoft Teams[2]) to maintain a dialogue across time zones will help keep everyone in the loop and engaged.

You may find you have less face-to-face time with participants to carry out your actual self-selection (the part where people move photographs around in real time). In some cases you might have as little as one hour of synchronous time together. This places even greater emphasis than normal on your planning, preparation, and use of tools, but it's possible to do this successfully. If you do have a limited time window of synchronous time, be sure to use that for people to do the actual choosing of their teams.

1. https://slack.com
2. https://www.microsoft.com/en-us/microsoft-teams

Inclusivity

Inclusivity is even more important in remote and hybrid settings, where you miss out on those spontaneous chats and the shared energy of being in the same room. To make sure everyone gets a chance to share their thoughts and be considered for different teams, you'll need to plan more deliberately if you want to re-create the type of "water-cooler" chats people are familiar with. For example, this might mean setting up virtual rooms where people can "pop in" for casual conversations. Using breakout rooms in tools like Zoom[3] or Teams can help create a space where everyone feels comfortable speaking up in a smaller setting.

Miro[4] and Mural[5] both offer dynamic visual whiteboards that mimic (or even exceed) in-person brainstorming, allowing team members to move digital sticky notes in real time. Actively using such tools is great for letting people write and share ideas in real time, making sure that even those who aren't in the same physical space can contribute equally.

Facilitators should be on the lookout to make sure remote participants are actively included in each conversation. In fact, running a remote event often means you'll need more facilitators than you would in person to maintain inclusivity and participation.

Technology

Choosing the best technology plays a key role in making self-selection work in remote and hybrid setups. Your go-to digital tools such as video-conferencing and real-time collaboration platforms can re-create the energy and interaction of in-person sessions.

Adapting your self-selection to the digital world doesn't just mean replicating exactly what you'd do in person. It's about taking advantage of what the technology offers, where things like collecting data on team preferences can be a faster, smoother experience online compared to in person—and which ultimately allows you to make better decisions.

By focusing on flexibility, inclusivity, and smart use of technology, the self-selection process can adapt to today's workplace to help teams stay connected, become aligned, and achieve the intentions of self-selection.

3. https://zoom.us
4. https://miro.com
5. https://www.mural.co

Self-Selecting in a Remote Environment

If you've ever been part of a remote or hybrid meeting, you know how things can go wrong: video can freeze, it can be difficult to hear a quieter team member, and if cameras are off you may be left wondering if people are still engaged, are multitasking, or have gone to walk the dog!

A self-selection event can draw even more attention to your ability to facilitate well when compared to a regular meeting because in self-selection, the stakes are high, and active participation is required from everyone.

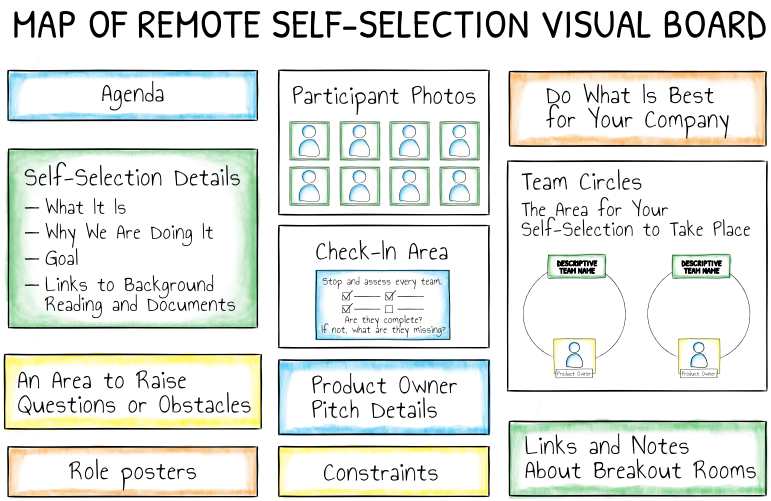
When running a self-selection event where everyone is online, choosing the right digital tools, ensuring clear visual elements, and keeping communication smooth are essential to making the process work well in a remote setting. Keeping participants engaged is one of your most important jobs as facilitator, and selecting the right technology is key to achieving that. You want the best available collaboration tools that support seamless interaction. This includes video-conferencing software with breakout rooms as well as real-time visual platforms for working and documentation. Here are some tools we've used successfully for remote self-selections:

- *Conferencing:* Google Meet,[6] Microsoft Teams, Slack, Zoom
- *Visual boards:* Miro, Mural, Figma[7]
- *Polling and games:* Kahoot,[8] Slido[9]
- *Documentation and planning:* Asana,[10] Google Docs,[11] Trello,[12] Confluence[13]

Getting the technology right is the keystone of a successful remote event. Within your technology choices, you need to plan for how you might include some of the following elements:

- *One central visual board:* Create a central, visually engaging board where participants can view all essential information and interact with the team selection areas. This board serves as the digital "room" where everyone can come together. Some core elements to consider are shown in the illustration on page 92.

6. https://meet.google.com
7. https://www.figma.com
8. https://kahoot.com
9. https://www.slido.com
10. https://asana.com
11. https://docs.google.com
12. https://trello.com
13. https://www.atlassian.com/software/confluence



To create a functional and engaging remote self-selection board, it's essential to include key elements that keep participants informed and connected. Start by placing a clear agenda at the top of the board, providing everyone with an overview of the event's flow and timing. A section for participant photos fosters a sense of presence and connection, allowing everyone to visually identify who's involved—a feature particularly valuable in remote settings where face-to-face interactions are limited.

The heart of the board lies in the Team Circles, where self-selection takes place. To ground participants in the purpose of the event, dedicate a space to self-selection details. This area should outline the process, its goals, and links to any background reading. Product owner pitch details and constraints provide a clear view of each team's mission and any specific guidelines, ensuring everyone has the information they need to make thoughtful selections.

To support communication, include an area to raise questions or obstacles, where participants can openly share any concerns. Finally, for hybrid and remote setups, add links and notes about breakout rooms to allow seamless movement between main sessions and side discussions.

- *Virtual icebreaker:* At the start of the session, set a friendly tone and get participants speaking and engaging right away. By doing this effectively and efficiently, you can help avoid the worst type of remote meetings: when cameras and microphones are turned off. It also gives you the added comfort as the facilitator to run a live test of all your technology to check that it's working in a safe-to-fail environment before the real decision-making begins.

- *Voting mechanism:* It's important to have a simple voting system for making decisions during the event. Whether it's choosing team members or identifying gaps, having an easy way for everyone to express their opinions ensures all voices are heard. You can choose whether to use sticky notes on a digital board or polling features in video conferencing tools. The key is to keep it simple and straightforward from a participant's perspective.
- *Raising a flag:* Make sure participants can easily reach out to the facilitation team if there are any issues. This could be through a dedicated support channel or some other clear way to raise concerns during the event.

You Can't Go Backward

While it should be common sense to have a method for participants to raise a question, your remote event might need several different methods available to participants concurrently so they can always raise their questions, challenges, and requests in the moment. If you were to miss something, where someone wasn't able to speak up in the moment, going backward and questioning or rejigging the self-selection outcome after an event is incredibly hard (if not impossible) when the teams have already been chosen.

- *Moving between rooms:* Smooth transitions between virtual rooms are important for keeping the event on track. A team of facilitators can help guide participants through each stage, making sure everyone knows where to go and what to do, just like in an in-person event.
- *Agenda and stages of self-selection:* Provide clear instructions on the self-selection process, including timelines and what's expected. Sharing this information ahead of time helps participants feel prepared and understand how everything will work.
- *Test the process:* Running a mock self-selection before the actual event is a great way to catch any technical issues and to improve your visual layout. It gives facilitators the opportunity to fine-tune the digital board, test the tools, and make sure everything flows smoothly. It also gives everyone a chance to get comfortable with the technology. When we've done this, we've found things like a movable portion of our virtual board, and it has saved us from having real problems during the day if things start to move or disappear.
- *Break often:* Plan for regular breaks to avoid screen fatigue and keep everyone engaged. Schedule them at set intervals, with clear start and end times.

The Critical Role of the Remote Facilitation Team

In the digital world, a facilitator's role goes beyond guiding conversations. Remote or hybrid facilitators need to be comfortable with the technology, ensuring that the digital space feels just as dynamic as an in-person session. This means being able to handle tech glitches smoothly, understanding the needs and mood of the people in the virtual room, encouraging quieter voices to speak up, and keeping the energy high. The success of a remote self-selection event largely depends on the facilitation team's ability to make sure every participant feels heard and included, even from a distance.

Therefore, having a small but dedicated facilitation team is crucial. They can manage the self-selection stages, offer support to tech issues, and keep discussions productive and inclusive. For larger events (with 100+ participants), it's a great idea to have at least five facilitators to cover all the rooms and locations, though you can adjust the number based on your context and needs.

When organizing the facilitation team, you should clearly define and assign roles. Facilitators can be assigned to specific "zones" (like different rooms on Zoom for example) to oversee interactions in those areas. Alternatively, you might have facilitators assigned to specific participants or teams, offering tailored support to specific people or groups.

Choosing the right facilitators up front is a key decision to get right. Look for people who are not only tech-savvy but also skilled in managing group dynamics and resolving conflicts. Facilitators should be familiar with the self-selection process and ready to handle any issues or questions that arise, whether that be smoothly managing tech hiccups or facilitating difficult discussions. Crucially, they should not be playing an active part in the self-selection, so that they can remain neutral and ask great questions without any skin in the game.

Remote Self-Selection Case Study: Travel

A leading South African travel-booking website faced the challenge of restructuring its teams during a strategic pivot in 2020. With teams spread across continents, it needed a new approach. Drawing on their experience with self-selection from their hackathons, they sought a similar structured method for forming lasting teams.

They adapted the approach we described in the first edition of this book to suit a distributed environment.[14] Agile coach Bevan Williams highlighted the importance of using digital tools:

> *Using digital tools became essential. We used Google Sheets as our central hub for communication, making it our single source of truth. Slack was used for instant discussions, Zoom for its breakout rooms during the event, Google Slides to guide the process, Google Drive for team information, and Google Drawings as a virtual whiteboard to track team formation in real time.*

An instrumental part of their preparation was conducting a dry run to test the digital setup, ensuring the remote self-selection process would work smoothly. Following the process outlined in this book, they began with product owner pitches, moved through iterative timeboxes for team selection, and finished with a closing phase to finalize the teams.

Despite initial concerns about running the event remotely, it was a huge success, with 8 out of 10 teams fully formed. The positive feedback highlighted the transparency and inclusiveness of the process. Over time, the teams that stayed together showed traits of high-performing teams, proving that self-selection can effectively foster team autonomy and alignment.

Self-Selecting in a Hybrid Environment

In our experience, hybrid facilitation can be the most challenging scenario to work with of all. Good reasons are certainly numerous for why you need to facilitate a hybrid event, but just know that it will bring challenges you wouldn't face if you were doing the event in person or even fully remotely. One possible way to avoid the extra effort (and pain) is to avoid hybrid in the first place and move everyone to a remote setting. However, you'll know your setup and locations and be best placed to answer the question, Should our self-selection event take place in person, remotely, or in a hybrid setting?

Facilitating a hybrid self-selection event—self-selecting when people are online and in person—can be even more challenging than purely in-person or remote formats, but extra effort can lead to a seamless, engaging experience that aligns with your organization's diverse needs.

The following ideas build on the recommendations for running a remote event, offering tailored strategies to enhance your hybrid self-selection.

14. https://www.nomad8.com/articles/case-study-self-selection-with-distributed-teams

- *Avoid local optimization:* Local optimization happens when decisions favor one specific location, often due to a larger number of participants in that area, the presence of senior leaders, or because a particular site is perceived as the "heart" of the company. While this may seem beneficial locally, it can undermine the broader goals of the organization by creating imbalances in team dynamics and reducing the effectiveness of self-selection. To prevent this, ensure that every aspect of the event aligns with your organization's overall strategy and culture. This alignment will help guide decisions that benefit the company as a whole rather than optimizing for one location at the expense of others. Strive to maintain a level playing field where everyone, regardless of whether they're participating remotely or in person, has an equal opportunity to engage and contribute to a shared vision.
- *Create a single source of truth:* Use a centralized digital platform to keep all team selections, decisions, and updates in one place. This prevents confusion and ensures everyone has access to the same information, whether they are on-site or remote. Specifically, you need to avoid one version of a team being shown on sticky notes on a physical wall in an office and a different version being shown on a digital board.
- *Dual facilitation:* Assign facilitators to manage both physical and virtual spaces, ensuring consistent guidance and support for all participants, regardless of location. If you have multiple physical locations, have multiple facilitators on-site who can act as a connection point.
- *Even participation:* Make sure all locations have an equal voice. Structured turn-taking or activities designed for balanced input can help prevent any one group or location from dominating.
- *Pulse checks:* Regularly check in with participants through quick polls, surveys, or feedback sessions to maintain momentum and allow for real-time adjustments.
- *Comprehensive communication:* Ensure everyone has access to the same materials, whether they're physical or digital, to keep all participants on the same page.
- *Hybrid map:* Create a visual map that integrates both in-person and remote participants, helping everyone understand the logistics and creating a sense of unity.

To better understand how these principles work in practice, let's look at two companies that successfully adapted self-selection to remote and hybrid environments.

Hybrid Self-Selection Case Study: Recruitment

A leading digital employment marketplace in Asia faced a unique challenge: its teams were dispersed across Australia and Asia. With a strategic goal to redistribute talent, dissolve certain teams, and form new ones in alignment with evolving priorities, gathering all engineers in one location was both impractical and prohibitively expensive. This necessitated embracing a hybrid self-selection model to combine in-person and virtual elements seamlessly.

Their hybrid self-selection event was meticulously planned over one and a half months.[15] Recognizing the necessity to blend physical presence with digital interaction, they leveraged the existing proficiency in tools such as Zoom and Miro, tools already embedded in its daily operations, to create a dynamic and inclusive self-selection environment.

To accommodate its dispersed workforce, they organized the event across three active in-person sites, complemented by comprehensive digital engagement. The logistical challenges of coordinating such a setup were significant, from booking rooms and managing calendar invitations to arranging meals and ensuring robust online connectivity.

Central to the self-selection process was a creative adaptation of Miro that enabled engineers to move digital "boxes" representing themselves—complete with photos and lists of skills and expertise—to their chosen teams. This additional element not only facilitated a smooth self-selection process but also allowed for better team decision-making based on each participant's capabilities and preferences.

Each potential team was represented by a frame on Miro, where the team's main priorities, name, leaders, and a concise pitch were detailed. Additional information was available through a link. A novel aspect of their approach was the inclusion of specific constraints and required skills for each team that guided participants toward teams where their expertise could be most impactful.

A critical insight from this experience was the importance of considering the ongoing hybrid nature of teams beyond the event. To avoid isolating team members in any location, a new guideline was introduced: at least two people from each team should be present in each geographical location. This consideration was crucial in ensuring the long-term effectiveness and cohesion of the newly formed teams.

15. https://medium.com/@jane.freider/self-selection-with-distributed-teams-how-to-make-it-happen-af4d249772a4

The self-selection day was a testament to the organization's prowess. With participants gathered across three geographical locations, plus additional leaders from a fourth location to assist, the event engaged 80 to 90 individuals through Zoom. Three facilitators, adept at managing the flow between Miro and Zoom, and the proactive use of Zoom breakout rooms, underscored the event's hybrid essence.

Uniquely, the self-selection process unfolded over six iterations. While it's not possible to attribute this solely to the hybrid format, it highlights the potential need to consider additional selection iterations if you're running a hybrid event.

This hybrid self-selection case study exemplifies the adaptability and innovative spirit required to navigate the complexities of modern team formation. By leveraging technology, fostering inclusivity, and meticulously planning, they demonstrated that hybrid self-selection not only is feasible but can set a precedent for crafting cohesive and agile teams across geography. This experience offers valuable insights and inspiration for organizations planning their hybrid self-selection, emphasizing the potential for even greater iterations and the profound opportunities for enhanced team autonomy and alignment in a hybrid work environment.

Hybrid Self-Selection Case Study: Online Fashion

The technology team of Australia and New Zealand's premier online fashion retailer embraced hybrid self-selection to optimize team composition amidst evolving priorities. With a dedicated team made up of 110 people, they sought to empower their workforce and allow individuals to choose their own teams.[16]

Leveraging Zoom and Miro, the technology team ensured an inclusive and cohesive hybrid selection environment for both remote and on-site participants. The process kicked off with product owners articulating their squad missions, followed by breakout sessions for deep dives into each potential team, enabling the informed team selection decisions that followed.

The selection culminated in a dynamic, real-time formation of teams, harnessing digital tools for seamless integration. This not only achieved strategic realignment but also ignited a sense of autonomy among staff.

To accommodate those unable to attend, preferences were gathered beforehand with a caveat: the fluid nature of self-selection often shifts initial choices, highlighting the need for a check-in after the event to ensure outcomes were

16. https://theiconic.tech/our-experience-with-squad-self-selection-spoiler-alert-do-it-f815ee573648

directly aligned to people's preferences. The people participating remotely had someone in the room moving their card for them. This is a common way for hybrid movements to be made when the balance of people physically present is higher than those dialing in remotely. It all comes down to where the highly visual single version of the truth sits for the teams being selected, which might be online or in-person depending on the location of your participants.

Their innovative approach showcased how hybrid environments can foster engagement and adaptability.

Follow in the Footsteps of the Eurovision Song Contest

Anyone who has seen the Eurovision song contest is unknowingly at an advantage for facilitating a remote or hybrid self-selection event. If you're not familiar with the event, it's an annual competition run across Europe where glamorous singers compete to be the continental winner. While the pomp and festival of the singing has little relevance to the idea of self-selection, the method of collecting scores absolutely does.

In Eurovision, the central location hosting the event will video call each European nation one by one to get their votes. To request votes from each country, Eurovision hosts connect via satellite and typically use a roll-call approach to ask "(city, country) can we have your votes please?"; we've copied this "go-around" Eurovision-style technique to run hybrid self-selection events. "Wellington, New Zealand, can we have the results of the first round of self-selection please?" It allows for transparency and equal participation, people know where to focus their attention, and no area is missed from the rotation.

What Next?

In adapting self-selection for remote and hybrid settings, the key is to balance technology, inclusivity, and flexibility. By embracing digital tools, fostering engagement, and preparing for logistical challenges, you can run self-selection events that empower teams to form, no matter where they are.

Next we'll look at what needs to happen after self-selection and how to move from the team blueprints you've produced to having teams actively establishing themselves as a working unit.

CHAPTER 7

After Self-Selection: Now What?

Congratulations! Now that you've completed your self-selection event, it's time to turn that enthusiasm into sustainable, effective teams. This chapter will guide you on this journey, helping you plan for what comes next.

Protect the Outcome

After your self-selection event, you'll have a blueprint of your newly formed teams, capturing their collaborative energy and plans. While this is a significant milestone, the potential still needs to be fully realized. Participants may ask, "What's next?" or wonder "Is our commitment to self-selection real?" These questions highlight the need for reassurance and a clear, stable path forward. As Linn Keife's experience shows, the true success of self-selection lies in what happens afterward and its sustainability.

> *Demonstrating that this journey is not a fleeting venture but a profound pledge to empower our teams is essential. It's about persisting in the principles and philosophy of self-selection, a promise we're ready to fulfill.*

This insight highlights the essential first step: protect self-selected teams from post-event adjustments. Guard against subtle pressures to alter team compositions, as even minor changes can undermine trust in the self-selection process and become an unintentional reversion to old management habits.

You might get requests, ideas, and suggestions that start to creep in. Could we swap Person A for Person B on these teams? We've got a new hire joining in a couple of weeks so we might also need to swap.... Stop! While well intentioned, these seemingly harmless requests risk undoing the autonomy and commitment built during self-selection.

Upholding the teams as chosen reinforces trust and autonomy, signaling that self-selection is genuinely valued. Any managerial overrides can damage this trust, with "fake" self-selection a far worse scenario than traditional team assignments.

Meet with New Teams ASAP

To act on the outcome of your self-selection event, the next critical step is to engage directly and speedily with each of the newly established teams. Open a dialogue among team members about their next steps and address any apprehensions they might have. An important aspect of these discussions is pinpointing a date that marks the official start of their new team—a line in the sand.

Our preferred approach for these sessions is to employ the Lean Coffee[1] format. This method facilitates meetings without a predefined agenda, instead allowing the agenda to emerge organically from the team members themselves at the start of the meeting. Following are typical questions posed by the new teams and the deeper concerns they signify:

Transitioning from Old to New

When can we start working as a new team, and how do we manage the transition from our current work?

After a big change, team members need clarity on when to begin with their new team and how to manage existing tasks—whether to wrap them up, hand them over, or integrate them into new responsibilities. This transition sets the pace for the team, and clear communication ensures work is reprioritized without dropped commitments. Let the team choose the start date, but move quickly, knowing things are rarely "done" and that there's never a perfect time to start.

Ensuring Capability and Readiness

Do we have the skills and resources to succeed, and how will we address any gaps?

Teams often recognize strengths and gaps after self-selection. To be fully prepared, take proactive steps to fill these gaps through recruiting, cross-training, or external support. Celebrate existing strengths, plan for what's missing, and begin—tackling challenges as a team.

1. http://www.leancoffee.org

Operations and Logistics

How should our operations adapt to support the new team setup?

Logistics include workspace setup and scheduling initial meetings, creating an environment that supports cohesive teamwork. Clear planning shows the setup is there to help, not hinder. If reporting lines need adjustment, handle this separately after teams are settled to avoid unnecessary complications.

Move Forward at Pace

When dealing with the aftermath of self-selection, it's important to see concerns as signs of progress, not obstacles. If people are worried about leaving current work unfinished, it shows their commitment. Apathy would be a much bigger problem. But this commitment can get tangled up in existing tasks, like a ball of yarn with no clear starting point. Sometimes, the only way to move forward is to make a clean cut and start fresh.

The urge to wait for a fully equipped team often clashes with the need to move forward. Our advice? Just start moving. Get things going as soon as possible, even if everything's not perfect. This builds a culture of adaptability and shared responsibility.

Waiting for the perfect moment is unrealistic. By starting now, teams build resilience and learn to support each other. It's in these imperfect beginnings that teams discover their strengths and begin to collaborate effectively.

Schedule Team Launch Events

Setting clear kickoff dates is essential to avoid leaving team members in limbo between old and new roles. A timely start helps maintain enthusiasm and prevents lingering over past tasks. Kickoff timing can vary widely—from immediate to several months—depending on factors like workload complexity, vacations, and new hires. Both a single "flip-day" (where all teams start on a set date) and staggered launches (with teams starting in succession) have their pros and cons; choose what best suits your organization, and ensure the dates are transparent to all.

Make the Overall Change Plan Visible

Making your transition plan visible across the organization is key. A clear, shared calendar showing team start dates—whether online or in a common space—helps build anticipation and keeps everyone on the same page. This openness also allows for collective celebrations as teams kick off. Keeping

communication transparent during this phase helps maintain momentum and ensures alignment.

One adjustment we've made since our early attempts is adding regular check-ins with teams during the formation phase. Initially overlooked, we've found that weekly meetings create a valuable space for teams to raise concerns, adjust timelines, or deal with delays like postponed start dates. These discussions often lead to solutions, but more importantly, they provide a forum for addressing uncertainties.

Plan for Kicking Off New Teams

With the framework set, the next phase is to ensure each team starts strong. Remember, that while formation is key, research outlined in Chapter 1, Self-Selection and the Art of Dynamic Team Design, on page 3, shows that 30 percent of a team's effectiveness depends on its launch.

Self-selection reflects the organization's trust in its people, empowering them to choose roles and methods such as scrum, kanban, a bespoke methodology, or even traditional project management. Maintaining this autonomy reinforces motivation and continuous improvement.

It's not merely about how teams are formed but about nurturing an environment where teams continuously own and refine their processes. As teams embark on this journey, offering guidance on agile and lean principles can be invaluable. Facilitate workshops or brainstorming sessions to help teams explore and select the practices that align with their objectives and working style. This collaborative approach ensures that the launch of each team is not just a beginning but a continuation of a culture that values autonomy, trust, and continuous improvement.

The kickoff phase is an opportunity to solidify the principles that guided the self-selection process, embedding them into the operational DNA of the teams.

In the following sections, we outline a structured approach to launching your team to help you ensure that your team's kickoff is as effective as it is engaging.

Each Team Needs a Launch Event

The kickoff should be an all-hands event. It's important for every team member to be present, as this is a foundational moment for the team. If scheduling conflicts arise, it's better to find a new date than proceed with an incomplete team.

A facilitator with deep knowledge of agile principles and practices should guide this session.

Recommended Team Launch Activities

It's important to establish a foundation for collaboration and trust. The following activities, shown in the following illustration, will help the team build connections, define their approach to ways of working, and set up the logistics needed for smooth operations.

THREE STEPS TO ESTABLISH COLLABORATION AND TRUST
Step 1: Building connections (1–2 Hours)
Step 2: Crafting your own agile recipe (1 Hour)
Step 3: Nailing down the logistics (1 Hour)

Step 1: Building Connections (1–2 Hours)

Begin with activities that foster personal connections and trust. The Journey Lines activity described by Lyssa Adkins in *Coaching Agile Teams [Adk10]* is an exemplary activity where team members map out their personal and professional journeys and mark highs and lows over time. This exercise doesn't just break the ice; it lays the groundwork for empathy and psychological safety within the team.

Step 2: Craft Your Own Agile Recipe (1 Hour)

The next step is to define how the team will work together by examining available practices. Start with an open brainstorm where team members call out practices they're familiar with, creating a menu of potential working ingredients. This list may include sprints, kanban workflows, daily standups, retrospectives, visual workspaces, and more.

With your practices menu at the ready, delve into discussions about each, weighing their benefits and applicability to your team's work. The aim is to make informed choices about the practices you'll adopt, ensuring each team member's understanding and buy-in.

Step 3: Nailing Down the Logistics (1 Hour)

Having outlined your approach, shift the team's focus to the logistics that will support your chosen methodologies. Topics for discussion include the team's definition of "done," sprint durations, meeting schedules, and tool

selection. This segment is about setting the operational foundation for your team, ensuring clarity on how you'll work together and measure progress.

Support Teams After Launching

As we saw in Chapter 1, Self-Selection and the Art of Dynamic Team Design, on page 3, a critical component—accounting for the final 10 percent of a team's performance—is the ongoing coaching support provided after the team's initial formation and launch. This support system is multifaceted, encompassing not just the coaches but also the line managers and mentors who together create a nurturing environment for the team.

Every new team should have access to a coach who guides, educates, and supports them, especially in the early stages. The coach's role goes beyond initial training—they help with regular check-ins and provide specific guidance as new challenges arise. These interactions are vital as teams adjust to their new ways of working.

However, in scenarios where full-time coaches aren't always available, we've found success in building internal knowledge networks—experienced team members stepping up as mentors, creating a train-the-trainer model. This approach has helped us sustainably grow coaching expertise within organizations.

Here are some key strategies to ensure effective support for your teams:

- *Regular touchpoints:* Establish scheduled check-ins with teams to discuss progress, challenges, and learning opportunities. These sessions are invaluable for reinforcing agile principles and practices and for addressing specific needs as they arise.
- *Mentorship pairings:* Pair less experienced team members with seasoned mentors within the organization. This one-on-one relationship provides a great space for learning and growth, complementing the broader team dynamics.
- *Knowledge-sharing forums:* Facilitate regular forums or workshops where teams can share their successes, challenges, and learnings with each other. This fosters a culture of continuous improvement and collective problem-solving.
- *Open-door policy:* Encourage leaders and coaches to maintain an open-door policy to reinforce the message that support is always available and that seeking help is a sign of proactive problem-solving, not weakness.

What Not To Do

Reflecting on past experiences, we've found that some of our best lessons come from missteps—ours and others'. To maintain the integrity of self-selection, here are key pitfalls to avoid:

- *Post-selection rearrangements:* In one case, after a successful self-selection event, the management team reassigned just a single individual to a different team. This became a cautionary tale, often referenced before self-selections that we run today. The move undermined the trust in the process, causing frustration and distrust.
- *Facades of autonomy:* Worse than reverting to manager-led selection is giving the appearance of choice while overriding team members' decisions. This facade erodes morale and damages trust in organizational values. Honor the decisions made during self-selection to build genuine autonomy.
- *No team input into future hiring:* As teams evolve and require new skills, extend the principles of self-selection to the hiring process. Involving teams in new hires ensures new members align with the team's culture and dynamic, preserving trust and cohesion.
- *Changing reporting lines during self-selection:* Self-selection is about choosing teammates for day-to-day collaboration, not about selecting managers. Combining team choice with managerial selection skews decisions, as people may prioritize managerial relationships over team fit. Keep these choices separate to preserve the integrity of self-selection.

What Next?

After guiding you through the initial post-self-selection steps—ensuring smooth transitions, prompt team kickoffs, and clear start dates—we highlighted key pitfalls to avoid to uphold and embed self-selection principles into your culture.

In the next chapter we'll explore over a decade's worth of insights, examining various scenarios, frameworks, and adaptations to make self-selection work across diverse contexts.

Part III

Learning from a Decade of Self-Selection

CHAPTER 8

Adapting Self-Selection to Your Context

Self-selection is a powerful tool for building empowered teams, and while its core principles are universal, the key to success lies in how well it's adapted to meet each organization's unique needs. In this chapter, you'll learn how to tailor the self-selection process to fit your culture, strategy, and team structure. We'll explore real-world applications across various industries and frameworks, offering case studies and ideas that will help you shape the process to meet your evolving team dynamics. You won't have to start with a blank slate like we did; instead, you can draw from the experiences of those who went before you and, hopefully, add your own contributions to the growing body of self-selection knowledge.

Understanding Your Unique Landscape

Your context will be different, the only question is how? Self-selection is never a one-size-fits-all process; its effectiveness depends on how well you adapt it to your organization's specific landscape. The sections that follow will help you understand the internal factors that will shape your self-selection event, from your strategic goals and team dynamics to your organizational culture and values.

To ensure a successful rollout, it's crucial for leaders to understand their role in championing this process. With that in mind, we've outlined some key points for leaders to champion self-selection. These takeaways will provide leaders with actionable insights they can apply directly when discussing and supporting self-selection within the organization.

Internal Factors: Key Points for Leaders to Champion Self-Selection

Internal factors within your organization play a pivotal role in shaping the self-selection process and its success or failure. These elements guide how you need to adapt the method to suit your specific context, with direct impact on how smoothly the process unfolds. Typically, internal factors that are within your control or influence fall into the following main categories:

The Purpose ("Why")

- *Be explicit about the "why."* When speaking with your leadership team, emphasize the strategic reasons behind self-selection, such as improving agility, scaling up efficiently, or driving cultural change. Leaders are more likely to support the process if they understand how it aligns with the organization's broader goals.
- *Define success clearly.* Provide concrete examples of what successful self-selection looks like in your context, whether it's high-performing self-organizing teams or faster project delivery.

Agility and Frameworks

- *Connect to existing frameworks.* If your organization uses a specific scaling framework (like SAFe or a Spotify-like model), explain how self-selection complements and strengthens these systems. Leaders will appreciate seeing how this method integrates with current practices.
- *Highlight flexibility.* Reassure leaders that self-selection doesn't mean chaos but rather a structured process that promotes alignment and adaptability.

Team Dynamics

- *Discuss team configurations.* Leaders need to be aware of the importance of balancing team sizes and skill diversity. Help them visualize the ideal team makeup and why flexibility in team adjustments can be beneficial.
- *Promote the value of dynamic reteaming.* Explain how periodic adjustments can drive continuous improvement and adaptability, which are crucial in a fast-paced environment.

Culture

- *Emphasize cultural fit.* Point out that self-selection thrives in environments that value trust and collaboration. Leaders should be ready to set the tone and model behaviors that encourage autonomy.

- *Engage in active support.* Encourage leaders to be visible advocates for the process. Their engagement shouldn't be passive; they must actively communicate the benefits of self-selection and be prepared to address any resistance.

Leadership Engagement

- *Be a vocal supporter.* Encourage leaders to communicate openly about the process, reinforcing the company's commitment to empowering teams.
- *Manage expectations carefully.* For organizations with a more hierarchical culture, advise leaders on how to frame self-selection as an evolution toward more collaborative, agile ways of working rather than a sudden, disruptive change.

External Factors: Outside Your Organization

Factors beyond your organization also play a significant role in shaping the process. While these factors are much more outside your control and influence, being aware of them and adapting accordingly is equally important. They influence how your teams are structured and determine the level of flexibility needed.

Market and Industry Dynamics

- *Responding to market shifts:* The pace and nature of your industry play a role in shaping the self-selection process. Fast-moving sectors may need more frequent reteaming, while stable industries can accommodate more fixed team structures.

External Team Members

- *Integrating external partners:* When working with external partners, contractors, or mixed teams across different organizations, the incentives, contracts, and goals of these external members can affect your team dynamics. Clear communication and understanding of the roles and expectations of external team members is crucial to successful self-selection.

Regulatory and Compliance Requirements

- *Governance:* In industries with strict regulations or compliance standards, such as financial or government organizations, team compositions may need to account for legal or procedural constraints.

Geographic Distribution

- *Location:* The availability of talent in different regions or time zones can affect how teams are formed, especially if you're working with remote or globally distributed teams. This may impact how you approach self-selection in terms of location and skill availability.

What Sparked Your Self-Selection?

While the internal and external factors we listed might shape your self-selection process, it's also crucial to identify what triggered your desire to self-select into teams in the first place. Understanding the specific catalysts allows you to tailor the process and your approach. For instance, selecting teams due to company growth will significantly differ in approach, tone, and speed from selecting teams during downsizing. Similarly, forming teams with newly hired people requires a different strategy than working with long-tenured staff. Recognizing and categorizing your own "spark" will clarify the adjustments you need to make.

Some common triggers we've seen that prompt organizations to adopt self-selection include changing company priorities, organizational transformation, adjusting to growth or downsizing, mergers and acquisitions, technological migrations or platform changes, innovation and disruption, geographic or market expansion, and product life-cycle completion.

Self-Selection in a SAFe Environment

In Australia, Em Campbell-Pretty, SAFe fellow and author of *Tribal Unity—Getting from TEAMS to TRIBES by Creating a One Team Culture [Cam12]*, took on the challenge of applying self-selection within the Scaled Agile Framework (SAFe) to form Agile Release Trains (ARTs) at a large financial institution.[1]

Following ideas from the first edition of this book,[2] the team from Pretty Agile worked with the bank's teams to let people choose their own roles and missions, all while working within SAFe's structure. Em remembers:

> *Those who know me will not be at all surprised to learn the first thing I did once there was agreement to use self-selection was buy and read Sandy and David's book,* Creating Great Teams: How Self-Selection Lets People Excel. *I had heard Sandy talk on the topic some time back, and my colleague had previously used the technique, so I wasn't walking in blind. My experiences with watching people bastardizing SAFe made me want to stick as closely to the book's guidance as possible. Specifically, we chose to keep the number of constraints to the absolute minimum.*

1. https://prettyagile.co/SS-Prep
2. https://www.pragprog.com/titles/mmteams/creating-great-teams

The Challenges

During the formation of the Agile Release Train, Em and her team faced three major hurdles:

Moving from preassigned to self-selected teams.

- The transition from preassigned team compositions to self-selection shifted the focus from fixed roles to defining team missions and configurations. This created initial tension within the organization, particularly around specialized roles such as agile facilitators and product owners. The organization diverged from SAFe's typical role allocation, allowing agile facilitators to contribute directly to team objectives in addition to their traditional roles.

Finding the balance between component teams and stream-aligned teams.

- To keep things aligned with company strategy while still giving teams autonomy, they blended the two team structures. For example, in the Campaign Innovation and Capability Development teams, they devoted some of their capacity to specialized tasks. This delicate balancing act required teams to manage both broad objectives and niche technical expertise.

Integrating in-house and offshore talent.

- One of the toughest parts was bringing together in-house and offshore team members. Self-selection was key in forming six well-rounded, multidisciplinary teams that could navigate the challenges of distributed workforces.

The Solution

To overcome these challenges, they made a few creative adjustments to make self-selection work in a SAFe environment:

- *Guided flexibility:* They stuck to the overall self-selection guidelines but stayed flexible. This helped them blend SAFe's structure with the freedom of self-selection, allowing teams to make their own decisions while working within the framework.

- *Role tweaks:* Certain roles, such as those in the Pipeline and System teams, were excluded from self-selection. This was necessary to maintain critical role-specific allocations essential to ART effectiveness, demonstrating that self-selection can still succeed within a framework that requires predefined roles.

- *Hybrid team structures:* The organization navigated the debate between feature vs. component teams by embracing a hybrid approach. They balanced agility with the need to address technical debt and maintain productivity, particularly for teams transitioning to kanban.
- *Smart role assignments:* Deciding how to handle specialized roles like scrum master and product owner was tricky. They split these responsibilities, letting scrum masters handle team facilitation while contributing to other work. This approach suited SAFe's pragmatic stance and the organization's size and agile maturity level.
- *Analytics-driven product ownership:* By putting senior analytics experts in product owner roles, they ensured that team missions were aligned with the company's data-focused goals, keeping everything strategically on track.
- *Compromises for integration:* Teams like Campaign Innovation and Capability Development integrated technical debt and innovation work into their workload, ensuring alignment with ART objectives while still allowing for focused team-driven outcomes.

The Outcome

The self-selection process allowed six multidisciplinary teams to form smoothly, balancing autonomy and structure. Since then, Em and her team at Pretty Agile have run many self-selections with SAFe and have incorporated it into their six-day Agile Release Train Quick Start process.[3]

This case study shows that even in highly structured environments like SAFe, self-selection can work with the right mix of flexibility and planning. The big takeaway? You can make self-selection thrive in any framework if you're willing to adapt and think outside the box.

Self-Selection Using the unFIX Model

At a large financial institution in the Netherlands, Willem-Jan Ageling has championed the continued use of self-selection. Guided by principles and ideas from the first edition of this book, and alongside Jurgen Appelo's unFIX model,[4] the organization has been able to build fluid, adaptable, agile teams.

3. https://prettyagile.co/QS-PIP
4. https://unfix.com

Somewhat unusually, this organization adopted self-selection prior to transitioning to agile ways of working—a bold move that doubled down on their commitment to autonomy and team empowerment. For them, self-selection was a "line in the sand," a declaration that they truly believed in their people's capacity to self-organize. By successfully implementing self-selection first, the shift to agile ways of working became a natural next step. As Willem-Jan explains, "We needed to prove we were serious about our commitment to the transformation, and self-selection was the perfect way to show it."

This organization refers to self-selection as a "marketplace," where teams form based on both individual interests and project needs, fostering a flexible and highly motivated workforce. In their inaugural self-selection event back in 2016 (and prior to adopting the unFIX model) nearly 300 people participated, transforming their structure from functional silos to cross-functional teams within a single afternoon. Remarkably, 80 percent of the teams were formed after just one round, with participants embracing the autonomy and sense of ownership the process fostered.

After many self-selection events and as their agile journey matured, they incorporated the unFIX model to bring alignment to departments with high autonomy but in need of a clearer shared direction. In 2022, a department of about 60 people used the self-selection process to create unFIX-guided, adaptable cells within a larger agile structure. Now when the organization acquires new companies or expands into new regions, self-selection is used to showcase their commitment to working differently and serves as a catalyst for embracing agile ways of working.

Their self-selection events, held entirely remotely since 2020, continue to follow the process outlined in this book, using tools like Miro and virtual breakout rooms to facilitate smooth, remote collaboration. "Virtual self-selection adds an extra layer of transparency," Willem-Jan notes, "allowing stakeholders to observe the process unfolding without interfering, which builds trust and confidence in the teams' ability to self-organize."

Self-selection has become a deeply embedded part of the institution's culture, with events held every six months, offering teams the option to reconfigure as needed. Today, the combination of unFIX and self-selection serves as a powerful "one-two punch" in their agile transformation tool kit, boosting retention and strengthening alignment across their 15,000-person organization.

Self-Selection to Boost Innovation and Employee Engagement

The leading online fashion and sports retailer in Australia and New Zealand embarked on a journey of self-selection to overhaul their team formation process.[5] Led by Jody Weir, head of agility, the initiative aimed to empower employees to choose teams aligned with their skills and passions, fostering deeper ownership and greater engagement across the company.

Leadership at the company decided to try squad self-selection within their 110-people tech team because they thought it might be a better approach to what they were currently doing, which was having managers decide who was on which squad. Jody Weir told us:

> *It's also efficient and effective. Even the best informed and well-intentioned managers will never be able to choose for an employee as well as the employee could for themselves. And it takes way less time. A bit of prep and a facilitated workshop and it's done and dusted, versus several meetings to gather preferences, make decisions, and communicate those decisions back to each individual.*

At the heart of their self-selection initiative was the creation of cross-functional squads that were strategically aligned with delivering superior customer outcomes. This structure aimed to break down silos, encouraging team members to contribute where their skills and passion intersected with the company's mission.

The Challenges

Of course, change isn't always easy, especially for employees who were used to top-down team assignments. But the fashion retailer tackled this head-on by making sure everyone understood their team's purpose. Each team had a clear mission, so people could see exactly how their work contributed to the company's broader goals. This clarity helped ease concerns and inspired confidence in the self-selection process.

Transparency was central to the initiative's success. By sharing the company's broader vision and strategy, leadership fostered an open dialogue, building trust and encouraging employees to make confident, informed decisions about where they could contribute the most.

Teams were given full autonomy over their working methods, from selecting tools to defining their own processes. This flexibility empowered teams to

5. https://www.nomad8.com/articles/case-study-the-iconic

adapt and experiment, ensuring that each team operated in a way that best suited their mission and objectives.

The Solution

Though the transition wasn't without its bumps, they made several key adaptations to ensure success:

- *Creating team missions:* In preparation for self-selection, each team was assigned a clear mission and objectives, ensuring that individuals knew exactly what each team was working toward, allowing them to make informed choices.
- *Dealing with team imbalance:* At first, some teams were more popular than others. To fix this, they ran multiple rounds of selection and encouraged open communication between teams, leading to a more balanced distribution of people.
- *Encouraging role flexibility:* The initiative didn't stop at team selection—employees were also encouraged to explore different roles within teams. This not only expanded skill sets but also increased adaptability within the organization.

The results of their self-selection process were impressive:

- *Higher employee engagement:* Giving people the power to choose their teams boosted satisfaction and made employees feel more connected to their work.
- *Better team collaboration:* With diverse skill sets and perspectives, teams became more collaborative and produced stronger outcomes for customers.
- *Faster decision-making:* By giving teams autonomy, they could make quicker decisions and respond more rapidly to customer needs.

The Outcome

This fashion retailer has run several self-selections for several quarters in a row within the technology department, and it has been wildly successful: 99 percent of their staff either loved it (77 percent) or liked it (22 percent).

This case study shows how transformative self-selection can be, even within structured environments. By letting employees choose teams that match their strengths and passions, organizations like this can boost engagement, improve collaboration, and become more agile—setting themselves up for long-term success.

Self-Selection to Merge and Reallocate Resources

Following the COVID-19 pandemic, changed consumer behaviors led to a decline in ad-financed TV streaming within a Stockholm-based media and entertainment company. The company needed to reprioritize its portfolio, which meant all but one of the teams that developed the ad-financed TV streaming service were going to be disbanded.

No one was going to be let go; on the contrary, the company was hiring. With a few successful self-selection initiatives under their belt, the management team recognized self-selection as a powerful tool to rapidly adapt to changing demands.

The Challenges

With existing teams already well established and having undergone a self-selection process just a few months prior, there was hesitation to repeat the entire process from scratch. Viktor Cessan, a leader and agile consultant, made the case for allowing the new members to self-select into the existing teams, citing efficiency and cost-effectiveness:[6]

> *What would we do if someone quit or joined? We can't run a full self-selection every time the team changes!*

So rather than reorganizing everything, the strategy focused on integrating new members into the existing structure:

- *Preserving teams:* The current teams remained intact, while new people were allowed to select into teams that matched their interests and strengths.
- *Team information:* Every team was clearly defined by its "North Star" goal, key performance indicators (KPIs), and metrics as well as an overview of who was already part of the team. This transparency helped new members make informed decisions.

The Solution

Given the remote nature of this self-selection, they turned to the online collaboration tool Mural to facilitate the process. Each participant uploaded three photos of themselves, representing their first, second, and third team choices. They placed their photos on a virtual board within their preferred teams, making their selections visible to everyone. After reviewing the choices,

6. https://www.viktorcessan.com/case-study-remote-self-selection-at-viafree

it became clear that the vast majority of participants, except for one, had secured their first-choice teams. This allowed them to conclude the process in just a single round.

Key adaptations they made were these:

- *Selecting into existing teams:* Instead of a full-scale reorganization, they allowed new employees to self-select into existing teams. This not only saved time and resources but also maintained team stability.
- *Streamlined virtual process:* Using Mural for a virtual self-selection kept things simple and efficient, allowing the company to adapt self-selection for remote work with minimal friction.
- *Transparency and clarity:* By providing clear team information up front, they made it easy for new members to choose where they would fit best based on team goals, metrics, and current team composition.

The Outcome

The self-selection process was completed efficiently in a single round, with most participants securing their first-choice teams. This preserved team stability while integrating new members smoothly.

This case study demonstrates that self-selection is valuable in situations like mergers, where integrating teams can often be complex. Their approach showed that it's entirely possible to bring a group of new people into established teams without disrupting the existing structure. By allowing the new team members to select into preexisting teams, the process preserved the spirit of self-selection—both the new and original team members ended up in teams they had actively chosen. Everyone, whether they were part of the department for years or joining after the merger, had the opportunity to align their strengths and interests with their team.

Self-Selection with LeSS

A New Zealand investment and advisory company offering sharebroking, portfolio management, and investment banking, faced a series of circumstances that required their teams to reorganize. The company chose Large-Scale Scrum, known as LeSS,[7] as the framework to support their evolving way of working, primarily because it allowed for one product owner to manage several teams. From a management perspective, the project was seen as a

7. https://less.works

21-person team self-organizing within a flexible framework, making LeSS an ideal choice to ensure alignment and adaptability.

Over the course of a few weeks, they prepared for the transition, moving toward self-organizing teams. LeSS, with its semi-static teams and "travelers" (team members who move between teams to teach or learn), offered some flexibility, but their culture and environment required an even greater level of adaptability.

The Challenges

The team's environment was complex, with multiple tools and shifting priorities. Staying in semi-static teams wasn't feasible. They needed to regroup regularly around the most important work. Self-selection was the perfect solution. The company had already held a full-day self-selection workshop six to eight months earlier, so the concept wasn't new, and that allowed them to move faster and reduce the up-front planning time. In fact, many team members had already started asking when the next self-selection would take place.

To meet these needs, and due to their existing knowledge and expertise, they introduced a two-week self-selection cycle, allowing the team structure to be reassessed and adjusted based on current work demands. This approach satisfied management's desire to see the group as one large team while still allowing the flexibility for smaller, self-selecting teams to form as needed for each sprint.

Ceedee Doyle, who facilitated the process, reflected on the benefits:

> *The beauty of self-selection was in its flexibility. We weren't just rearranging teams for the sake of it—we were allowing the teams to shape themselves around the work. This adaptability was super-important, especially in an environment where the tools and tasks were constantly evolving. It gave people agency, and that's what made everything work so well.*

The transition wasn't without its challenges. One key part of LeSS is joint planning, where all teams refine stories together, but this proved challenging because many team members were unfamiliar with the other teams' technologies and work. The first planning sessions were spent explaining what each team was responsible for rather than planning the actual work. To address this, cross-training sessions were introduced. By the second sprint, team members started crossing over more frequently as they became familiar with each other's work.

The Solution

They implemented a two-week self-selection and sprint cycle, enabling teams to experiment and reorganize without long-term commitments. Self-selection became a low-risk method to test new structures and foster learning opportunities. Though management initially grew concerned when the entire team rushed to explore a new technology in the second sprint, they soon realized it was just a two-week experiment. Afterward, the team returned to a balanced state, with members confident that they hadn't missed out and making choices based on company objectives and work priorities.

Key adaptations they made were these:

- *Frequent self-selection cycles:* Teams reorganized every two weeks, allowing for rapid adaptation to shifting priorities and work needs.
- *Cross-training:* Cross-training sessions were introduced to familiarize team members with different technologies, enabling more fluid movement between teams.
- *Prioritized learning:* All work was done in pairs to ensure knowledge sharing to enable dynamic team allocation by self-selection.

The Outcome

By adopting a two-week self-selection cycle, they achieved several significant outcomes:

- *Improved cross-team collaboration:* Teams communicated more effectively, thanks to frequent reorganization and cross-training, leading to greater alignment on goals and responsibilities.
- *Backlog reduction:* The adaptability of self-selection allowed teams to focus on high-priority tasks, which resulted in a faster reduction of backlog items.
- *Increased team ownership:* With the flexibility to choose their own teams, members felt a stronger sense of ownership and accountability over the work.
- *Adaptability in a complex environment:* The frequent cycles allowed them to remain agile in a constantly evolving environment, ensuring that teams were always aligned with the most critical work.

The use of self-selection within the LeSS framework not only enhanced flexibility but also fostered a culture of continuous learning and ownership. The

ability to reorganize every two weeks gave the organization the adaptability needed to handle changing priorities while maintaining strong collaboration across teams.

Self-Selection with FAST Agile

Before diving into the details of this case study, it's important to note that the rapid cycle times described here are not the norm. The success of these frequent self-selection events was made possible by a unique combination of factors: the organization's preexisting Extreme Programming (XP) practices and a highly skilled team accustomed to frequent change. For most organizations, a considerable amount of up-front effort in planning and preparation is necessary to establish a solid foundation for self-selection. Only once that groundwork is well established should you consider experimenting with more frequent cycles.

In 2016, Quinton Quartel conducted an experiment at a traditional health insurance company using FAST agile, a framework he designed that emphasizes self-organization and autonomy.[8] FAST combines Open Space Technology with Open Allocation to enable dynamic team formation and adaptability. It allows work to flow organically and for teams to constantly reorganize themselves around the most pressing priorities.

The company needed a way to manage work between a legacy system and a new mobile platform.[9] Rather than assigning employees to projects, which limited opportunities for growth, they opted for a self-selection process where employees chose their teams every two days.

The Challenges

The company sought a more flexible system, where teams could self-organize based on skills, interests, and the evolving needs of the business. With Quinton Quartel's FAST agile approach, the company envisioned a dynamic solution where teams could self-select every two days, enabling rapid adaptation and continuous alignment with business goals.

The decision to use a two-day cycle was driven by the need for rapid adaptability. Short cycles allowed the company to respond swiftly to changing business demands, while aligning with their Extreme Programming (XP) practices, where pair-programming often enabled teams to complete tasks in

8. https://medium.com/fluid-scaling-technology/theres-a-new-kid-on-the-agile-block-fast-agile-b568bef3245c
9. https://drive.google.com/file/d/1gSuk-JDGZkmfxTVJh7oMV7FD8jJdFUf-/view

that time frame. This not only ensured efficiency but also gave employees frequent opportunities to re-form teams and take on new challenges.

The Solution

To facilitate this, a marketplace of work was introduced, where volunteer leaders presented the key tasks that needed attention. Employees were empowered to choose the projects and teams that interested them, ensuring that personal motivation and company priorities were aligned. This system not only encouraged fluid movement between projects but also gave employees regular opportunities to explore new challenges and expand their skill sets.

At the beginning of each two-day cycle, a product map was created, which displayed the available work and high-level features that needed to be developed. Teams then self-organized around these tasks, ensuring that business priorities were met efficiently. The teams followed XP practices to ensure smooth collaboration and onboarding, making it easier to manage the rapid pace of change within the organization.

Key adaptations were these:

- *Frequent self-selection cycles:* Instead of holding self-selection at set intervals, the company implemented two-day cycles. This allowed for rapid team formation and adaptation to shifting priorities, while aligning with XP practices.
- *Marketplace of work:* Employees selected tasks from a work marketplace, giving them the flexibility to move between projects as needed.
- *Dynamic leadership:* Leadership roles were voluntary and fluid, allowing anyone to step up and lead a team or task. This encouraged natural leadership growth and flexible team dynamics.
- *Single round of selection:* Most employees secured their first-choice project in a single round, making the process efficient and enabling quick team formation.
- *Backlog management with discovery trees:* Discovery Trees were introduced to visualize the work backlog, offering a clear and structured view of tasks to aid in informed decision-making during self-selection.
- *Feature stewards:* Feature stewards acted as key points of contact, providing continuity and ensuring alignment with business goals in a constantly evolving environment.

The Outcome

The FAST agile experiment at the health insurance company led to several important outcomes:

- *Resilience:* The system proved highly resilient, as the collective of self-organizing teams made continuous progress despite staff changes, vacations, or illnesses. The dynamic nature of FAST agile meant that work could be redistributed efficiently when necessary.
- *Adaptability:* Teams were able to move their efforts to where they were most needed, thanks to the flexibility of the two-day cycles. This enabled the company to respond rapidly to changes in business priorities.
- *Higher employee engagement:* The self-selection process boosted employee motivation and engagement. As team members had the autonomy to choose their work, they felt more invested in the outcomes. Feedback from participants included comments like "I never want to work any other way" and "This is my preferred agile method going forward."
- *Improved collaboration:* The frequent cycles of self-selection encouraged teams to work more closely together, share knowledge, and collaborate more effectively. The use of pair programming and collective ownership also contributed to smoother collaboration.
- *Increased agility:* The two-day self-selection cycles allowed for quick adjustments to team structures and priorities, ensuring the company could remain agile in the face of constantly changing market and technological conditions.

Quinton Quartel summarized the outcomes of the experiment:

> *Resilience—the Collective made continuous progress regardless of vacation, sickness, and staff changes.*
>
> *Adaptability—we were able to move effort to where it was most needed.*
>
> *Employee Engagement—"I never want to work any other way" and "This is my preferred agile method going forward" were some comments I heard during the experiment. I put this down to the intrinsic motivation that comes from autonomy at work.*

This case study highlights the power of self-selection within the FAST agile framework. By combining frequent self-selection cycles, a marketplace of work, and adaptable leadership, the health insurance company successfully transformed its work processes. The dynamic, self-organizing system enabled the company to scale its agile practices while maintaining flexibility, engagement,

and responsiveness to business demands. The FAST agile experiment demonstrated how autonomy and self-organization can drive both productivity and employee satisfaction, making it a valuable approach for organizations navigating complex, fast-changing environments.

What Next?

In this chapter, we delved into the versatile nature of self-selection, illustrating its effectiveness across a range of scenarios. Through practical examples and theoretical frameworks, we demonstrated how self-selection's adaptability makes it a powerful tool for any organization, enabling the formation of empowered and cohesive teams ready to tackle unique challenges and seize opportunities.

As we move forward, we'll delve deeper into the insights gathered from over a decade of self-selection events. Expect valuable lessons on effective facilitation, leadership, and the often-surprising challenges that arise when teams self-select. The next chapter will equip you with actionable wisdom to anticipate obstacles, refine your approach, and make self-selection a sustainable part of your organizational culture.

CHAPTER 9

Insights: Lessons We Have Learned

After facilitating self-selection events, observing the method in action and seeing outcomes across different companies, we've uncovered valuable insights into how individuals respond when given the autonomy to choose their own teams. The process doesn't just build better teams; it shines a light on the people. When individuals are empowered to choose their own teams, we see their values and priorities in action—from a deep-rooted thirst for autonomy and meaningful purpose to the bonds they form with colleagues.

We share our insights in this chapter, along with the findings on the long-term effects of self-selection to help you benefit from the lessons we've learned. You'll see how self-selection influences individuals, team dynamics, and organizational culture and what drives people's choices. We've also collected real stories and examples of the most common mistakes so that you can see clearly how not to screw it up.

How Self-Selection Affects People

Let's start with one of the most fundamental takeaways from these events: how deeply self-selection impacts the people involved. Beyond just building better teams, the method taps into individuals' desires for autonomy and trust. It transforms the way people view their roles within the organization by giving them ownership over their choices. This shift fosters a stronger sense of both responsibility and engagement, which are crucial for long-term success and satisfaction.

People Appreciate Having a Choice

After every self-selection event we've seen, the feedback has been overwhelmingly positive. Even those participants who started out with doubts are often left surprised by how much they appreciated the process. Most people found

the team they wanted to join, and even those who may not be entirely happy with the end result fully understand and appreciate the reasons why they're on a team, because they were part of the conversation and the decision-making process.

Contrast that to those finding out they've been assigned a new team by management selection, and you can understand the different reaction self-selection generates. A number of people also tell us that they now work on the team they expected to work on before the event took place, so participants certainly go into the event with a certain level of expectation and pre-thought.

At the end of every event we always ask everyone about their experiences and whether their expectations have been met. We also ask what they think of the process and whether they appreciate the results it generated. What follows is a sample of a survey we use to ask participants for their feedback.

POST SELF-SELECTION PARTICIPANT SURVEY

1. How did you find the experience of self-selection?
2. Did you end up on the team you thought you would?
3. Are you happy with the team you will be on?
4. What primarily drove your self-selection choice?
   - ❑ The type of work
   - ❑ Product owner
   - ❑ Doing what was best for the company
   - ❑ People you wanted to work with
   - ❑ People you did not want to work with
   - ❑ Other (please tell us)
5. What did you particularly like about self-selection?
6. What did you particularly dislike about self-selection?
7. Would you recommend others follow this model?
8. Tell us one thing you observed during the event.
9. Any other thoughts, suggestions, or observations?

The survey is a combination of questions that give us insight into what participants think and other questions that give us an approximate Net Promoter Score (question 7). We also include open questions to give people the chance to respond freely, and we usually gain excellent insights from the open questions. Following are some of our favorite quotes from past surveys:

> *Freedom! Fascinating to see how it all worked out. Excellent result, and nice to know we were able to achieve it without having to get dictatorial.*
>
> *It was a good way to bring issues to the fore quickly and show them visually. I liked going round and seeing whether teams were formed or not.*
>
> *It did give people the chance to choose where they wanted to go, but everyone was also thinking about what would work best for the company.*
>
> *The fact that we actually get to do this at all. It would never even have been considered in my last company.*

One interesting aspect we notice across companies and countries is that people in their thirties and forties, who have been in the workforce longer than others, seem to have much more awareness of what a privilege the opportunity to self-select is (especially when compared to recent graduates, for example). People working in their first jobs probably assume this is normal, and hopefully, with their expectations being met and such a positive experience, it can be.

But it's not just the freedom to choose that drives success in self-selection. A lot of power lies in who people choose to work with. Overwhelmingly, the most significant factor in team selection is personal relationships. Let's take a closer look.

Relationships Are the Deciding Factor

Across the different self-selection events we've been part of, it's been fascinating to observe what people base their team selection on. The most important factor we've seen has been their personal relationships—participants make decisions almost exclusively based on who they want to work with—and in some cases who they don't want to work with.

This dynamic plays a far more significant role than many are willing to admit, even to themselves. Though participants initially frame their decisions around skills or tasks, conversations during self-selection events tend to revolve around who wants to work with whom. It's common to see people move in small groups, driven by personal connections rather than professional factors. In fact, a few of our surveys found that most participants claimed they were making decisions based on what was best for the company, but our

observations told a different story. Discussions about who they wanted (or didn't want) to work with were far more common at the time.

Those who had not been able to make it to an event through absence or sickness could nominate a proxy to make a selection on their behalf. The most frequent instruction to proxies was "Make sure I'm in your/their team."

It's fair to say that sometimes people don't want to work with each other. And that's okay. People know whether they're going to gel in a team with a particular person, and if not, it makes sense they would choose not to work with that person. This process, unlike management selection, allows them to make that choice.

In one early self-selection event, two participants who strongly disliked each other repeatedly moved teams to avoid working together. Far from being a problem, this allowed both individuals to find more compatible environments, preventing future conflict entirely. Self-selection lets people make these choices themselves, avoiding the forced dynamics that can arise from top-down decisions.

While relationships drive much of the decision-making, they're only part of the story. Behind every successful self-selection event is a foundation of trust that people will make the right choices for both themselves and the organization. And what's truly remarkable is how consistently people rise to the occasion when given that trust.

People Respond Well to This Level of Trust

Going into large-scale self-selection events, we've had some anxiety about how people would act. Would giving them this much freedom result in chaos? What if people didn't take the process seriously? Instead we found that in every single case when given trust, people act responsibly and professionally. Looking back, it's almost *funny* to remember that we hoped people would respond this way. Now, with hundreds of examples, we have real evidence that handing over this level of trust fosters responsible, professional behavior every time.

People who get the privilege to decide for themselves whom they want to work with aren't the only winners. Companies usually learn a lot about what people choose (and do not choose). This information is highly useful for understanding team dynamics and planning future recruitment. For example, after the first selection round in one of our self-selections, almost all the developers had moved themselves into teams focusing on back-end-heavy projects, leaving the more front-end and design-centric teams sitting largely empty. So we could see we had a weight of interest in certain areas and not in others.

Management teams, which aren't directly involved in the process, of course, find the feedback to be incredibly useful, even when that feedback highlights areas of the company as less appealing to work in. It provides a great opportunity to dig deeper and to ask the right questions.

After a self-selection event at his company, Roger Nesbitt, development manager at Powershop NZ, commented:

> *We learned that our delivery team staff have a deep understanding of what makes a good team and the self-discipline to organize themselves. Looking at the teams that were self-selected, we (as managers) couldn't think of a better arrangement of people and skills.*

Self-selection doesn't just lead to better team outcomes—it builds a sense of mutual respect between people and leadership. When participants understand why certain decisions are made, they're more willing to accept them, even if compromises are required. Self-selection might seem tiring, slow, or even frustrating at the time, but the process is as important as the outcome.

Trust is what fuels immediate success in self-selection, but its impact doesn't stop there. When trust becomes embedded in your organizational culture, it leads to far-reaching, long-term benefits. Let's explore how self-selection can continue to shape your teams and your company's future long after an initial event.

Long-Term Benefits of Self-Selection

While the immediate results of self-selection—energized teams, higher morale, and increased engagement—are visible and often celebrated, the true impact emerges over time. The long-term benefits of self-selection are profound, fostering a culture of trust, accountability, and sustained high performance that extends well beyond the initial event.

To understand your long-term benefits, you should continuously gather your own data on team performance, team happiness, and productivity. You can use these metrics to refine your approach over time. Where we have collected data and insights, we've learned about the following significant long-term benefits.

Impact on Engagement

One of the most significant long-term effects of self-selection is the sustained increase in employee engagement and happiness. When people choose their own teams, they take greater ownership of their work and their relationships with colleagues. This sense of autonomy doesn't just provide a temporary

boost—it creates lasting commitment and motivation. Over time, people feel more connected to their teams and the goals they're working toward, leading to a deeper sense of fulfillment.

We were fascinated to see that following the introduction of self-selection, we often saw people happiness increase steadily in the months and years following self-selection. Using our own engagement, innovation, and productivity survey, we usually track this trend and find that autonomy, mastery, and purpose—the key drivers of motivation—continue to rise. Although there are always natural fluctuations, particularly around high-stress periods or challenging work, the overall trend is unmistakable: people who choose their own teams stay happier and more engaged over the long term.

By fostering an environment where people feel empowered to make their own decisions, self-selection can also lead to higher retention and lower turnover. People are more invested in their roles, not just because they chose them but because they feel trusted and supported by the organization. This creates a virtuous cycle where happiness fuels engagement, which in turn drives performance, making self-selection a powerful lever for long-term success.

Of course, sustained engagement is only part of the equation. Over time, this sense of ownership and responsibility extends beyond individuals to transform entire teams. When people trust and invest in each other, their teams grow stronger, more cohesive, and more resilient. Let's look at how this manifests over the long term.

Impact on Teams

Over time, self-selection fosters the development of small, cohesive, and high-performing units. Because individuals choose their teammates based on trust, compatibility, and shared goals, teams naturally form stronger bonds. This sense of shared ownership reduces conflicts, encourages deeper collaboration, and transforms teams into what many refer to as "work families"—groups that support each other both professionally and personally. The concept of a work *family* is apt because, like real families, these teams don't eliminate conflict. In fact, they may argue and disagree, but they stick together, working through issues with a commitment to shared success.

Before one self-selection, the most common concern was that participants would be "signing away their lives," having to work on a team for as long as they were with the company. This concern turned out to be unfounded because team changes always follow, but the very same people who had feared this

would then go to great lengths to remain with their chosen team for the foreseeable future and, in fact, rally against any proposed changes which followed.

As mentioned earlier in The Art of Team Design on page 6, Harvard professor J. Richard Hackman, a leading expert in teams and leadership, supported this notion of team autonomy. In *Leading Teams: Setting the Stage for Great Performances [Hac02]*, Hackman argued that self-designing (his term for self-selecting) teams—those that control not only their day-to-day tasks but also their structure and who is on the team—show higher engagement and performance over time. He emphasized that giving teams the ability to influence their composition and processes fosters a stronger sense of ownership, which is essential for long-term success. In these teams, while managers set overarching goals, the team itself determines how to achieve them.

We've observed that self-selected teams become more effective over time. Built on trust and shared purpose, these teams are better equipped to navigate the complexities of long-term work and maintain a consistent high performance.

But it's not just the teams that evolve in this process; managers, too, find their roles transformed. As teams take on more autonomy and responsibility, managers shift from traditional overseers to facilitators of growth and innovation.

Impact on Managers and Leaders

The role of managers transforms significantly after self-selection. Traditionally, managers spend a considerable amount of time assembling teams, addressing team dynamics, and mediating conflicts. However, with self-selection, much of that responsibility shifts to the team itself, freeing managers to focus on higher-level strategic work. Instead of constantly putting out fires, managers can now concentrate on fostering a culture of growth, supporting team development, and making more forward-thinking, impactful decisions.

As self-selected teams take ownership of their internal dynamics and problem-solving, managers evolve into coaches and leaders rather than controllers of team composition. This shift not only reduces managerial burden but also enhances the overall leadership capacity within the organization. Managers become more proactive, guiding teams toward long-term goals and helping individuals grow in their roles rather than micromanaging the day-to-day operations. This redefined role can be both challenging and liberating and can allow managers to focus on building a stronger, more innovative organization.

With managers stepping back and teams taking full ownership of their work, the impact on productivity and delivery becomes obvious. When people are empowered to make their own decisions and resolve their own issues, the results speak for themselves.

The Transition Can Be Difficult

One manager described his former way of working as that of a meerkat, where they would pop their head up, look around, and sometimes find a fire to go and fight. He was so used to this way of working that for weeks after self-selection he'd still pop up, look around, realize there was no fire for him to fight, and sit down again. Moving to a more strategic and proactive position can be a reasonably difficult transition, but a highly rewarding one nonetheless.

Impact on Delivery and Productivity

Self-selection has a significant impact on the long-term productivity and delivery speed of teams. When individuals choose their teams, the resulting collaboration is more cohesive and efficient. This directly impacts the team's ability to deliver high-quality work faster. With fewer internal conflicts and a clearer sense of ownership, self-selected teams can align more closely with business objectives, driving faster and more reliable delivery of outcomes.

We've measured productivity and noted a marked increase after self-selection was introduced. Teams that had chosen to work together demonstrated greater focus and faster cycle times, releasing more value in shorter periods. They also improved quality, leading to fewer defects and rework. By creating an environment where teams take ownership of both their work and their processes, self-selection fosters a sustained improvement in both delivery speed and overall productivity.

The improvements in team productivity are impressive on their own, but when applied across an entire organization, they lead to something even more profound: cultural transformation. As self-selection becomes embedded in the culture of your company, it reshapes how your people collaborate, innovate, and deliver value.

Impact on an Organization

Self-selection embodies the principle of trusting people to solve complex problems and empowering them to organize in a way that works best for both themselves and the organization. As people are given the autonomy to choose

their teams and work, they become more invested in the success of the company. The long-term impact is profound—organizations that adopt self-selection rarely revert to traditional models, because the benefits are too clear to ignore. Teams become more resilient, adaptable, and aligned with the company's evolving goals, creating an agile, engaged workforce that drives sustained performance and innovation.

With increased productivity, happiness, and innovation within an organization the benefit realization is clear, but of course it's entirely possible to run self-selection and not get the results you aspire to. Let's take a look at what some of the most common pitfalls and mistakes look like next.

How to Screw It Up

In this section, we walk through a series of potential screw-ups for you to keep in mind so that you can avoid these pitfalls and experience only the best self-selection experience—and hopefully reduce the chances of you contributing to a later version of this list.

Being Underprepared

You underestimate the planning required.

Self-selection might seem simple on the surface: let people choose their own teams, sit back, and watch magic happen. But if there's one surefire way to screw it up, it's by rushing the process and underestimating the level of preparation needed. One company, for example, embraced the concept of self-selection so quickly that after persuading their leadership team, the chief technology officer wanted to proceed with the selection just one hour later. While enthusiasm is essential, this highlights a dangerous misconception—that you can jump into self-selection with little to no groundwork.

In reality, successful self-selection requires detailed planning, clear communication, and plenty of preparation. From defining the right constraints to ensuring teams understand the process, skipping these crucial steps can lead to chaos. If you want to avoid failure, invest the time up front to prepare thoroughly. (See in-depth coverage of these ideas in Chapter 3, Laying the Groundwork, on page 31.) This means creating a solid blueprint for the event, gathering input from all levels of the organization, and communicating expectations well in advance. Think weeks or months, certainly not hours.

Introducing Too Many Constraints

You turn self-selection into an unsolvable puzzle.

While setting a few constraints is necessary for guiding self-selection, piling on too many can stifle creativity and make the process impossible. It's easy to overwhelm participants by adding layer upon layer of restrictions—who can work together, specific skill requirements, resource limitations, and more. Instead of empowering teams to make thoughtful, informed choices, you end up creating a maze of complexity that even the best well-intentioned teams can't navigate. The result? A process that feels more like managerial selection with hoops to jump through, leaving participants frustrated and disengaged.

More Constraints Equals Less Trust

The number of constraints placed on participants is inversely proportional to the level of trust you have in them—more constraints indicate less trust, and fewer constraints signal greater trust.

When you introduce too many constraints, self-selection quickly shifts from a liberating process to a logistical nightmare. The key is to strike a balance: provide enough guidance to ensure teams align with business goals but leave enough flexibility for them to make decisions based on their strengths, relationships, and preferences. Remember, the goal of self-selection is to empower people, not to trap them in a box where every decision feels predetermined. Simplifying the constraints ensures the process remains dynamic and responsive, leading to better results.

Ignoring the Timeboxes

You hope that increasing the time will yield better results.

One of the core principles of self-selection is the use of short, sharp timeboxes designed to generate quick decisions, maintain momentum, and make efficient use of everyone's time. However, neglecting this structure can lead to a small drift that snowballs into a significant delay, leaving teams incomplete by the end of what is now a long day.

During one self-selection event, facilitators made the mistake of extending the 10-minute limit for discussions and decisions. Ten minutes became 20, then 30, and eventually 40 minutes per iteration. They believed that more time would lead to better, more thoughtful decisions, but instead it caused the entire process to unravel. Progress slipped gradually at first, but soon the delay was substantial. The extended discussions drained energy, disrupted the flow,

and diminished engagement. By the end of the day, they hadn't reached a viable outcome, participants were visibly frustrated, and the facilitators regretted abandoning the carefully designed structure.

The lesson is clear: respect the timeboxes. They're not arbitrary; they are deliberately crafted to keep the event moving efficiently and ensure you make the best use of everyone's valuable time. Trust the process, maintain the rhythm, and keep the momentum going.

Faking Self-Selection

You pretend it's autonomy while managers decide.

One of the fastest ways to undermine self-selection is by pretending it's about autonomy while quietly steering decisions from behind the scenes. This happens when managers set up the process to appear democratic, but in reality they already have a desired outcome. Teams may be allowed to choose their members, but if their choices are overruled, redirected, or heavily influenced by leadership, the process quickly becomes a facade. It's not self-selection—it's managerial selection in disguise, which is even more damaging due to its duplicitous nature, as it pretends to offer autonomy while actually doing the opposite.

The problem with fake self-selection is two-fold. First, it erodes trust. People quickly recognize when their choices are being manipulated, and this damages the credibility of the entire process. Second, it defeats the purpose of self-selection, which is to empower teams and foster ownership. When you fake autonomy, you not only lose the benefits of self-selection, but you also introduce cynicism and disengagement. If you're going to do self-selection, commit to it fully. Let the teams decide—even if the outcomes aren't exactly what you envisioned.

Managerial tinkering can show up before, during, or after a self-selection, so you need to keep your eyes peeled and protect the participants and the decisions they make from interference. Before an event, it can show up as predetermined selections which "have" to be in certain teams. During, it can be stepping in to make decisions when things get hard, and after, it can be as simple as one or two tweaks. Any time is a bad time.

Assuming You're Done When the Event Ends

You think the real work ends after the initial selection.

One of the most common misconceptions in self-selection is that once teams have been chosen, the hard part is over. In reality, the initial selection is just the beginning. While the buzz of the event may leave everyone feeling energized

and aligned, the true test comes in the weeks and months that follow. Teams will need time to adjust, settle into their new dynamics, and tackle unforeseen challenges. Without ongoing support and regular check-ins, even the most thoughtfully selected teams can lose momentum, encounter conflicts, or struggle with productivity.

Successful self-selection isn't a set-and-forget process. It requires continuous nurturing, where managers act as facilitators rather than directors, ensuring teams have the resources and guidance they need to thrive. Neglecting this phase not only undermines the benefits of self-selection but can also lead to disillusionment. To avoid this pitfall, treat the post-selection period as a critical stage of team development, providing support and helping teams adapt as they grow into their new roles.

Letting Managers Pull Strings

You subtly influence decisions from the shadows.

Another major pitfall of self-selection is when managers try to pull strings from behind the scenes, subtly influencing team decisions without overtly stepping in. This manipulation undermines the very principle of self-selection, where the power to choose rests with the people. When managers suggest or "strongly encourage" certain decisions, teams can feel pressured to conform to what they believe their leaders want rather than making independent choices that align with their strengths and preferences.

This kind of subtle interference not only erodes the authenticity of the process but also breeds distrust. Teams are quick to sense when their autonomy is being undermined, even in small ways. For self-selection to truly work, managers need to trust the process and let teams make their own decisions—even if those decisions aren't what they would have chosen. The role of leadership is to guide and support, not to steer.

Mixing Managerial and Team Selection

You get the worst of both worlds.

Trying to blend managerial selection with self-selection is a surefire way to get the worst of both systems. In this scenario, you might allow teams to make some choices while other key decisions are made by management. This half-hearted approach creates confusion and resentment. On one hand, teams feel a sense of false autonomy, thinking they have control, while on the other, management retains authority over critical decisions. The result

is frustration and disengagement as people realize their choices are ultimately limited or overridden.

This hybrid model can lead to paralysis, as teams struggle to navigate unclear boundaries between autonomy and top-down control. It also undermines the entire point of self-selection, which is to empower teams to take ownership of their work. By mixing these two approaches, you dilute the potential benefits of both, leaving teams frustrated by their lack of real influence. For self-selection to succeed, it must be a full commitment to autonomy—not a compromise between control and freedom.

Waiting for the Perfect Time

There is no perfect time.

One of the biggest mistakes you can make with self-selection is waiting for the "perfect" moment to implement it. Leaders often hesitate, thinking they need to get every team aligned, have no urgent deadlines, or wait until the stars align to avoid disruptions. The truth is there's never a perfect time. Business needs will always evolve, deadlines will always loom, and teams will always have some internal flux. Waiting for perfection only delays the benefits of self-selection and sends the message that empowering teams isn't a priority.

The reality is that self-selection is designed to handle change and uncertainty. In fact, it thrives in dynamic environments because it allows teams to adapt to shifting needs in real time. By trusting your teams to navigate the complexities of the moment, you demonstrate that they're capable of handling challenges. Don't wait for the ideal conditions—create the conditions for self-selection to succeed, even if things aren't perfect.

Overpromising

You pretend self-selection is a silver bullet.

Self-selection is a powerful tool, but it's not a cure-all for every organizational challenge. One of the biggest ways to set it up for failure is to overpromise the results, positioning self-selection as the ultimate solution to all your team and productivity problems. Leaders who hype self-selection as a silver bullet create unrealistic expectations, leading team members and managers to expect instant success without effort. When the inevitable challenges arise—conflicts, growing pains, or slower-than-expected progress—people quickly become disillusioned, thinking the process has failed.

The truth is, self-selection is a tool that, when used correctly, fosters ownership, engagement, and trust, but it requires ongoing effort and refinement.

Like any process, it has its limitations and won't fix every issue overnight. To set your teams up for success, be clear about what self-selection can and can't achieve, and emphasize that its value comes through long-term commitment and continuous improvement—not magical overnight transformations.

Intervening Too Soon

You step in when teams don't look perfect after round one.

Self-selection is not a flawless process, and it's important to accept that the first round of team formation may not yield perfect results (in fact it almost certainly won't). However, one of the quickest ways to undermine the benefits of self-selection is to intervene too soon—stepping in to "fix" perceived issues right after the teams form. It's tempting for managers to correct what they see as imperfect team compositions, but this reaction stifles the very autonomy that self-selection is designed to foster.

Teams need time to find their footing, work through initial discomforts, and learn how to operate effectively together. Immediate intervention signals a lack of trust and denies teams the opportunity to resolve issues on their own. Let the process breathe. Give teams the space to navigate challenges and grow together, knowing that bumps in the road are part of building strong, high-functioning teams. Trust the process, and resist the urge to jump in too early.

Pushing Ahead Without Key People

You run the event when critical players are absent.

Running self-selection without key players present is a mistake that can derail the process from the start. It's tempting to move forward even when essential team members are unavailable, perhaps due to time constraints or pressure to implement the process. However, when critical stakeholders—such as product owners, key developers, or team leaders—are absent, the decision-making process becomes unbalanced. Teams can't form optimally, and key voices are missing from discussions that determine the project's future.

The absence of these key individuals can lead to misalignment and friction later on, as the teams formed without them may not have the insights or direction needed for success. For self-selection to work effectively, everyone involved needs to be part of the conversation. If critical people are unavailable, it's better to delay the event than to proceed without their input. This ensures that the decisions made reflect the full scope of organizational needs and that teams are set up for long-term success.

What Next?

The insights we shared in this chapter stem from our experiences across a wide range of self-selection events. People thrive when given the autonomy to make decisions, and unsurprisingly, their choices are often guided by relationships and trust. This process reveals much more than just team formation—it unveils how your people work, collaborate, and grow when given responsibility.

However, the journey doesn't end with the event. Successful self-selection goes beyond careful preparation and avoiding common pitfalls; it's about fostering a culture of continuous trust and empowerment. To achieve this, you need to trust the process, believe in your teams, and embrace the value of autonomy.

As you move forward, remember that the real work can begin after self-selection. How will you keep the momentum alive? What will you do to ensure teams stay engaged and energized months down the line? In the next chapter, we'll explore strategies to maintain the spirit of self-selection in the long term. We'll discuss how to handle inevitable team changes, foster long-term engagement, and implement practices like "transfer windows" to keep your teams thriving.

CHAPTER 10

Keeping the Spirit Alive

Self-selection doesn't end with a single event. While forming teams through this process can feel like a significant achievement, it's actually just the beginning of a much longer journey. You've started to create a culture where autonomy, choice, and collaboration thrive—but now the challenge is keeping that spirit alive. Self-selection isn't just a one-time exercise but an ongoing commitment to ensuring your teams stay dynamic, engaged, and aligned with your organizational goals.

Why keep it going?

Because it's not only great for your people—it's essential for your company's success. The benefits you've already seen from your first self-selection event, like increased ownership and better team performance, can compound over time. Building on the foundations you've laid will help your organization sustain its agility and responsiveness to change.

A culture of self-selection should include everyone, including new hires. As people join after the initial event, they too deserve to be part of this culture, experiencing the autonomy that defines self-selection. In this chapter, we explore how to keep this culture alive.

Reality Check: Teams Will Evolve

It's a fact: teams change. People take on new roles, work evolves, and organizations grow, shrink, or pivot. The real work doesn't end with one self-selection event; it's just the start of ongoing team changes. Here are some key principles to remember:

- *Expect changes:* People will move between teams over time. Whether it's promotions, departures, or new hires, teams are fluid, not fixed.

- *Transparency is key:* Self-selection thrives on openness. Keep future changes just as transparent as the original event to maintain trust. Communicate decisions clearly, update team structures, and involve people in the process.
- *No need for a blank canvas every time:* Self-selection doesn't mean resetting teams with every iteration. Provide the opportunity for team changes, but don't feel you need to start from scratch every time.

Sustaining Self-Selection: A Continuous Cycle

The most effective way to maintain the self-selection culture is through regularly scheduled events, typically every six to nine months. This rhythm keeps the spirit of autonomy alive and allows teams to refresh without the cost of major team disruptions. In fact, many companies are surprised at how little teams change each time the opportunity arises. But the value isn't just in the changes themselves—it's in the freedom to choose, even if people ultimately decide to stay where they are.

This regular cadence takes the pressure off and makes each self-selection event easier. People know they aren't locked into one team forever and can reassess their choices periodically. It strikes a balance between stability and flexibility, ensuring that teams don't become stagnant while avoiding the chaos of constant reorganization.

Self-Selection Can Spread to More Than Just Teams

One of the most powerful aspects of self-selection is how the culture it creates can extend beyond the initial teams or event. In some cases, the idea of autonomy and choice becomes so ingrained that people begin to self-select spontaneously, even when they weren't initially included in the process.

As Em Campbell-Pretty, a regular facilitator of self-selection events, shared:

> *The most unexpected highlight also occurred on day two of our product increment planning. Some people from the support teams who had not been part of the self-selection process decided they weren't in the right teams and formed a whole new squad! This certainly brings a whole new meaning to the concept of self-selecting teams!*

This spontaneous team formation demonstrates how powerful the principles of self-selection can be. When people see how effective it is for others, they want to be part of it too. By fostering a culture where self-selection is the norm, you open the door for these kinds of organic team formations—driven by the people themselves, not management.

Close Teams with Care Before Starting New Ones

Before diving into the next self-selection event, take the time to close out existing teams thoughtfully. Celebrate their achievements, reflect on their journey, and create a sense of closure. This not only honors the team's work but also makes transitions smoother, both emotionally and practically.

As Sandy recalls:

> *One thing I've learned is that before you move on to something new and exciting, it's important to find closure. Even though a fresh start is thrilling, it's also associated with a sense of loss. That's why I often run a metaretrospective focused on closure rather than handover. In one self-selection event, I held a feedback session with a collection of teams the day before, and it made a big difference. It gave everyone a chance to reflect, close out their work, and start the new chapter with a clearer head.*

Whether it's transferring knowledge or managing emotions, taking the time to reflect and close out old teams ensures everyone is ready for what's next.

Closing teams thoughtfully isn't just about marking the end of a chapter—it's an important part of preparing for what comes next. As you move forward, each new phase in your self-selection journey builds on the foundation of trust and collaboration you've established. With that in mind, let's turn our focus to the next steps.

Create a Self-Selecting Vision for the Future

You've now read how companies of all shapes, sizes, and industries—from global corporations to small teams—have successfully embraced self-selection across different contexts and locations. Each has faced its own hurdles, yet they found ways to overcome resistance by maintaining a clear vision for a more autonomous future. To ensure lasting success, it's essential to develop your own vision for how self-selection will shape not just your teams but your organization and culture. The vision you create should inspire ongoing commitment to autonomy, transparency, and collaboration while guiding you through challenges and setbacks. By aligning self-selection with your broader goals, you'll cultivate a resilient, adaptive culture that thrives on trust and choice, setting your organization up for long-term innovation and success.

Now It's Your Turn

Self-selection is more than just a team-building exercise—it's a shift in how your organization operates and how people engage with their work. You've heard firsthand how empowering teams to make their own choices fosters

accountability, innovation, and a deeper commitment to shared goals. But now the real challenge begins: embedding this culture into your organization so that it thrives long after the first event.

This isn't about perfection or waiting for the "right" time. It's about starting, adapting, and learning as you go. Your role is to sustain the momentum, cultivate the values of trust and transparency, and continue giving people the opportunity to grow through choice. The tools are in your hands—now it's time to take bold action.

What Would You Do If You Weren't Afraid?

So, ask yourself: what's the next step you can take on your journey of self-selection? Maybe it's scheduling a self-selection event or simply starting a conversation about team autonomy with your leadership group. Whatever it is, don't wait for the perfect moment—create it.

As you begin this journey, you might not feel ready, but that's okay. Ask yourself the same question we asked when we first decided to try self-selection:

What would you do if you weren't afraid?

Sometimes the only way forward is to take that leap and trust the process.

Help Spread the Word

Reviews make a huge difference! If you enjoyed the book and found it helpful, please consider sharing your thoughts with others by leaving a review on your favorite site.

Sandy & David

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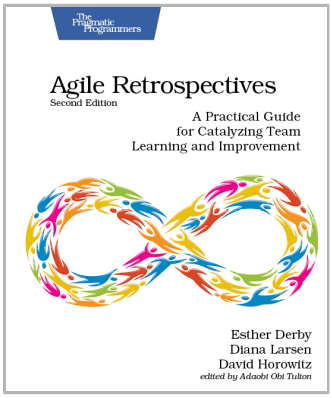

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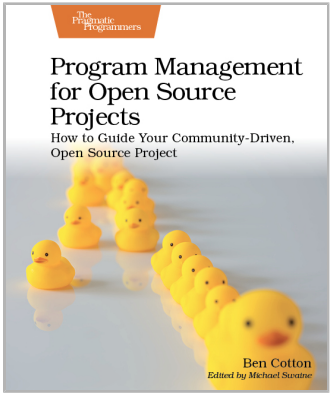

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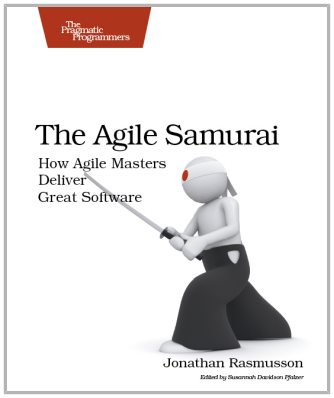

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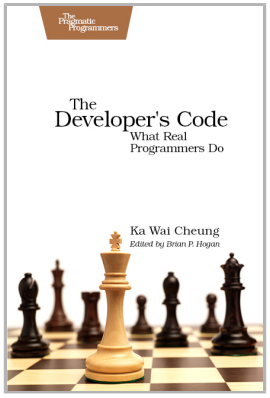

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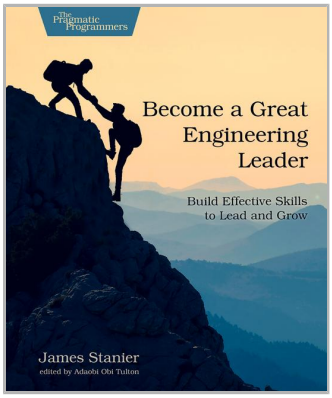

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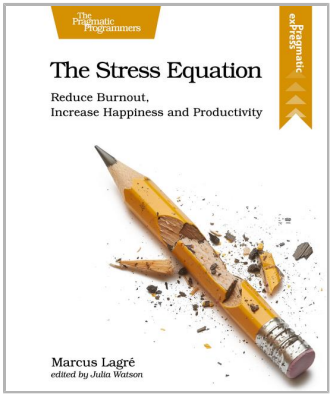

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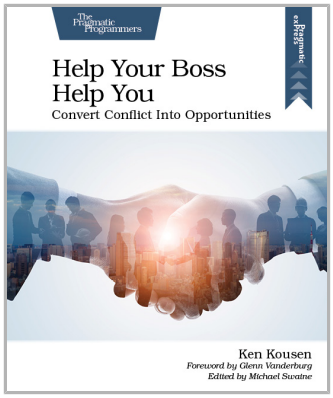

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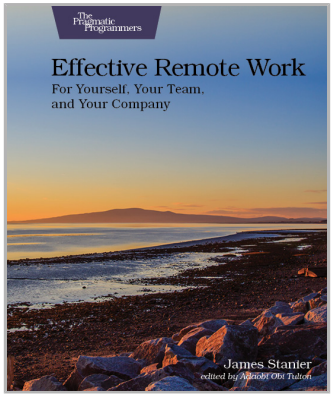

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