Running Excellent Retrospectives
Talking with People

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@hashoctothorpe

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Hi, I'm Courtney. I'm an SRE and incident response specialist, and I'm here to talk about what to do when everything goes wrong and you need to talk to other people in order to make it better

The subtitle of this talk could also be "words mean things".

some words about words

This talk was written about North American English, but English is not a single language with a single standard meaning for every word or phrase. Most of us work with people from around the world, who speak many dialects of English, and the guidance I am about to give you may not apply in all cases. Unfortunately, I don't have the knowledge or experience to localize this for each of you, and even if I did I definitely wouldn't have the time to explain it all. After today's session, I will tweet a link to my slides from SREcon Asia, which have some information on the linguistic principles I used when writing this workshop. You can use that information to examine the language environment you find yourself in.

Goals of this workshop

learn how to:

- run a retrospective (or be a great participant in one)
- create a good emotional space for a retrospective
- as a byproduct, learn how to run a great meeting

Most of this workshop is written as if you'll be the facilitator- which is geat, because when you're participating instead of facilitating, you'll know what will be most helpful for the facilitator, which will make the whole retro go better.

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- retros are tiring, and this tutorial will be too- it will involve a lot of work and potentially tense emotions
- participation is strictly optional, feel free to revoke your consent to participate at any time
- it's always okay to say "pass" or just flail incoherently if you don't feel comfortable talking or performing a role!
- ...but I hope you'll participate, let me know if I can change anything to help you feel comfortable participating
    - I'm hoping for a highly interactive conversation atmosphere, feel free to ask questions whenever -- just raise your hand.
    - also, feel free to raise your hands to answer questions posed to the room
        - it's okay to be a nerd here
- remember, this is your dime! I'm here to answer your questions and help make sure you have a good experience

Schedule

4:00–4:15   Introduction to Facilitation

4:15-5:15   Skill session: Facilitation

5:15-5:30:   Questions

tell me about you

I'm going to ask a few questions so I can tailor some of what I say to who's in this room
Raise your hand if you're:
- a manager?
- someone who primarily does operations?
- a developer?
- a developer who carries a pager?
- any sort of person who carries a pager?
- if you weren't in any of those groups?
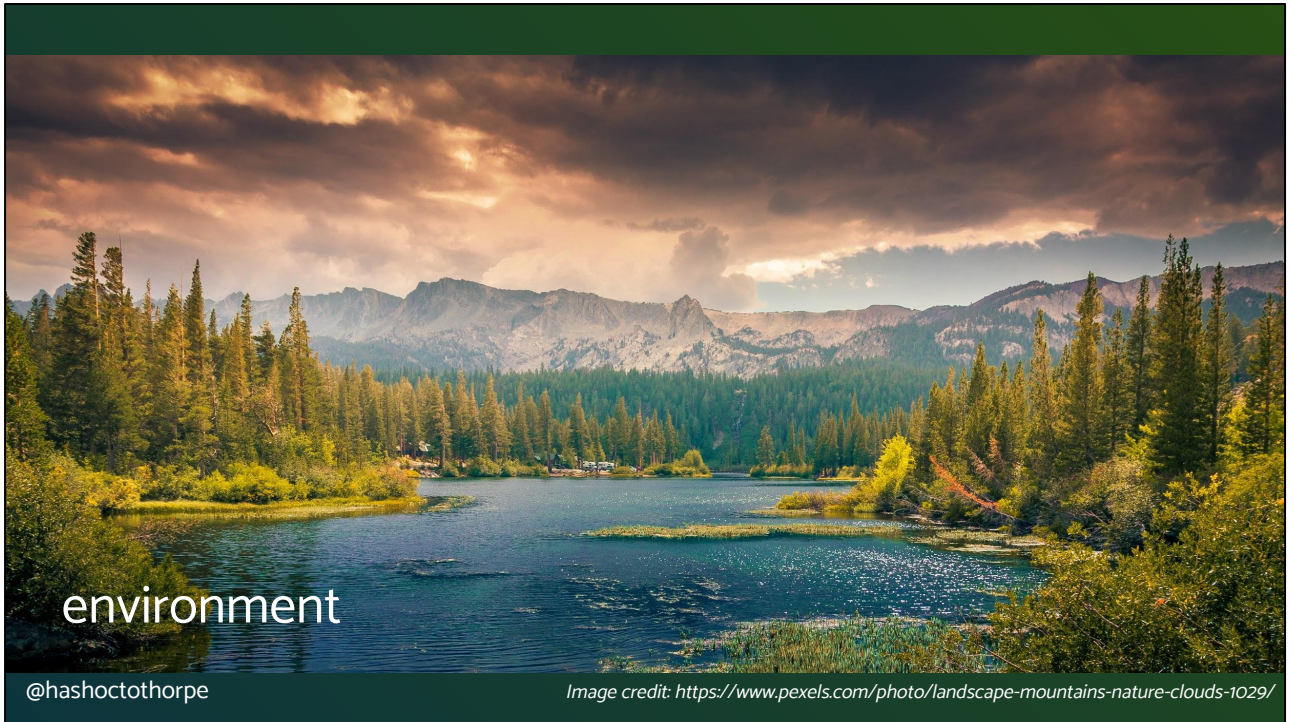 - Okay, shout out your job title

Thanks!

Anyone:
- been in a retro?
  - a really good retro?
  - a not-so-good retro?
- ran a retro?

you have three jobs

- facilitation
- running a productive meeting
- not screwing things up by making bad jokes

environment

Image credit: https://www.pexels.com/photo/landscape-mountains-nature-clouds-1029/

When I began this training I worked to make this a comfortable and welcoming environment
- set ground rules
- described the schedule
- Asked about you

During the training, I will
- keep things on topic
- enforce the ground rules

but before any of that, we (lex and I) prepared:
- wrote learning exercises in advance
- **Thought about what would give you the right experiences to learn from**

perceptual learning

The most effective way to learn a skill is to experience another person doing it. This is called "perceptual learning", and Kathy Sierra gave a talk on it at O'Reilly Fluent

I'm trying to create an environment where you can learn from how how Lex and I put together this tutorial

everything I'm doing today is "how to run a retrospective"- not just the things I say

job 1:
facilitation

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Image credit: https://commons.wikimedia.org/wiki/File:Tulista_-_Haworthia_minima_in_cultivation_2.jpg

I'm going to be using the frame of an incident retrospective, but all of the techniques I discuss apply to other kinds of meetings too (compliance meetings and planning meetings, product and specification meetings) and also they apply during the response to an incident. No matter what problem you're working on, these techniques are good for you and for the people you work with and they will get better results for everyone.

As a facilitator or an incident commander, your main jobs are to keep the conversation blame-free, not make bad jokes, and to run a pretty good meeting or incident

side note: I'm not here to tell you not to swear

because if I couldn't say "fuck" on a regular basis I wouldn't be able to run an incident anymore.

but I am here to tell you not to cuss out your team. Don't swear AT the people on your side, don't call them names, and don't call the things they made names either.

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Image credit: https://pixabay.com/en/dog-labrador-black-and-white-sad-1126025/

Let's talk about blame

English is a pretty blamey language
"You knocked over that vase"
"Why did you knock over the vase?"

"you"

yeah, you! I'm talking to you! don't you just walk away!!

"You" "yeah, you! I'm talking to you! Don't just walk away!!"

that feels terrible

Starting a sentence with "you" draws a line between yourself and the person you're addressing
So does using it too often
It creates an oppositional conversation- there is the person saying "you" and the person being "youd" at

"why"

why did you do that? why did you do it LIKE that?

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"why did you do that? Why did you do it LIKE that?"

that also feels terrible

Asking a question that starts with "why" is a request for a justification- it immediately puts the person you're addressing on the defensive
"Why" questions get you answers in agentive language ("because I knocked it over"), which has blame in the very grammar- because a person did a thing
Agentive language is strongly remembered by English speakers, so then you've ensured that the blame sticks in everyone's mind

other things not to say to people

- always
- never
- every time
- should
- just
- only

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There's more, but these are the least wanted

"why didn't you just fix it the last time this happened?"

Exercise: "why didn't you just fix this the last time it happened?"
Let's take it apart- what do you see here?

Assumes:
- it's happened before
    - maybe more than once
- it could be fixed the last time it happened
    - easily (this is the "just")
- "you" was the right one to fix it
- there was no good reason not to fix it

Image credit: https://pixabay.com/en/maze-labyrinth-glendurgan-garden-511153/

okay so how DO we do this

We want to evoke thoughtfulness and complexity

better things to say

- how
- what
- what if
- could we
- what do you think about
- what would you have wanted to know

All of these are designed to get more complex answers when used in a question
When asking a question, think about what you can say that will get the **longest** answer
This might be hard- in business, we sometimes get in the habit of asking questions that will get us the most concise answer possible, so you might need to practice asking questions that elicit complex answers

This is a creative process, both for you and for the people participating- one of the things you're trying to do is **imagine a better world**

human error is not a root cause

*...human error as a root cause isn't where you should **end**, it's where you should **start** your investigation.*

> – John Allspaw, referencing Sidney Dekker, David Woods, and others

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when you're asking those better questions, you may hear that something went wrong because of "human error"
- but "human error" is actually where you should **start** your investigation
- people make the best decisions they can with the information they have
- so:
  - HOW did the human make the error?
  - What allowed the error to happen?
  - How did the error take the system down?
  - How long did the human take to notice the error?

"try harder" is not a remediation

The beatings will continue until reliability improves.

– some combination of my colleagues

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Fallacy: "Well, now that we know about this kind of mistake, we can just not do it again."

Depending on humans to avoid errors is unreasonable. People can't be perfectly vigilant and they can't just be better rested- the human you had today is the human you have to plan for in the future, complete with sleep deprivation, small child, hangover, money worries, or some combination of the above.

Miller's Law

"In order to understand what another person is saying, you must assume it is true and try to imagine what it could be true of"

This is how to understand complex answers when you get them

"In order to understand what another person is saying, you must assume it is true and try to imagine what it could be true of"

George Armitage Miller
I learned about this from Suzette Haden Elgin, in The Gentle Art of Verbal Self-Defense

This is THE KEY to understanding systems, and people who have different perspectives and experiences
This is how you can begin to understand why things are the way they are in any context, but especially one that's not yours
It's also a critical tool when conducting a retrospective, because no two people have the same experience of an incident

"the sky is green"

This seems ridiculous

Exercise: What can you think of that would make it true?

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Image credit: https://pixabay.com/en/aurora-borealis-night-818716/

colored glasses
looking at a photo or painting where this is literally true
hurricane
sunset/sunrise
talking lyrically about a tree canopy
colored windows
mayyybe color vision issues
aurora!

people don't do things for no reason

Just like people say things that are true even if they seem impossible, people always have reasons for what they do that make sense within the context they perceive

Even if they're high as a kite, they have a reason that makes sense given how the world looks at the moment

let's talk disasters
who doesn't like a good disaster*?

* No one died or was injured in this disaster

Image credit: http://www.wsdot.wa.gov/Projects/SR520Bridge/Photos/Damage.htm

Seattle has the two longest floating bridges in the world, and in 1990 one of them sank over Thanksgiving day weekend, in a storm, while it was being repurposed.

The public reporting to this day is extremely simplistic, but the official investigation found that there were five factors involved and all of them were required for the bridge to fail.

Hydrodemolition
water storage and trucking
one pontoon sank first and dragged 7 more down after it

things are more likely to break when you are fucking with them

Stop at 3:18

no one does things they think will blow up the world

People do the best they can with what they know and the resources they have
Asking about what a person knew and what the conditions were will give good insight for effective change.

What sorts of things might have happened here that seemed sensible at the time?

[workshop]

complex failures

"The loads that created significant leakage were the combined effects of all accumulations of water, including rain after the wind storm, longitudinal flow on the surface of the bridge, and pumping through Nov. 24, 1990. These loads caused static moments [...] that exceeded the threshold for leakage. [E]xisting cracks were open[ed] sufficiently to allow water to leak into the pontoon. Progressive and accelerating sinking began at this time."

Dusenberry, D., Zarghamee, M., Liepins, A., Luft, R., and Kan, F. (1995). "Failure of Lacey V. Murrow Floating Bridge, Seattle, Washington." J. Perform. Constr. Facil., 9(1), 4–23.

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The official analysis

"The loads that created significant leakage were the combined effects of all accumulations of water, including rain after the wind storm, longitudinal flow on the surface of the bridge, and pumping through Nov. 24, 1990. These loads caused static moments [...] that exceeded the threshold for leakage. [E]xisting cracks were open[ed] sufficiently to allow water to leak into the pontoon. Progressive and accelerating sinking began at this time."

And even with all of that, there was something missing. There's a note in the paper that the tankers weren't keeping up with the schedule for emptying the pontoons, so there was more water in the bridge than there should have been. Additionally, there were high and low spots because the water wasn't being pumped out evenly. But either no one talked to the tanker crews, or no one recorded what they said- so to this day, we know that the pumping situation was a factor in the sinking of the bridge but we don't know what kept crews from being able to follow the schedule.

this was almost a good retrospective

But the official investigation missed something huge- the crews were having trouble keeping up with the pumping schedule set by the engineers and we will never know why that was.
The human factors weren't explored in the investigation- or if they were, that exploration wasn't documented

Conway's Law

organizations which design systems ... are constrained to produce designs which are copies of the communication structures of these organizations --Melvin Conway, in 1968

The Design of
Everyday Things

Donald A. Norman

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Humans created everything in your infrastructure, which means all problems are people problems. Literally everything that exists is the way it is because of a human making a decision (or many decisions)

This means nothing is immutable (even though some things are stuck)

It means that understanding the decisions that came before is how you make things better

let's talk about running a meeting
aka "job 2"

This is your second job

There are lots of resources out there for running a good meeting- a bewildering array
I'm going to talk about some general points that dovetail with facilitation

select a notetaker

You need someone who is explicitly responsible for taking notes
if you don't write down something in a retrospective, it didn't happen
If you have enough people, having a notetaker who wasn't involved in the incident is ideal
make sure it is not always the same people
lots of groups fall into having the same few people take notes in every meeting, because those people are "good at it"
those people **never get to participate as much as everyone else**
this also allows other people never to get good at it

When you ask for a volunteer to take notes, get comfortable with a really uncomfortable silence
If one of the handful of people caves first, **turn them down** and tell the group that it's someone else's turn
if you have to draft someone, draft a person who does it rarely

stay on time and on topic

If you're facilitating, have an agenda, stick to it, and stay on time
- helps keep you from missing things by running out of time
- lets participants know what you'll cover and when
- helps participants stay with the group
  - people who are lost feel self-conscious and are less comfortable engaging
- digressions can be boring for the group or inhibit participation, especially if one person is filibustering or has a hobby horse. staying on track helps make sure everyone stays engaged

If you're participating, your job is to help the group stay on track. Before you share, ask yourself if what you have to say is on topic and needs the entire group's attention. If one of those isn't true, try to bring it up later in a more appropriate context. Keep your eye on the agenda and stay engaged, even if you have nothing to contribute right now. Sometimes the best findings in a retro are about the interactions between participants, not just one person saying a thing. Help make sure note-taking is shared fairly by volunteering

active listening

When a person is speaking, look at them! Whether it's on a video call or in person, let them know with your body language that you are paying attention and that you find their contributions valuable. This will encourage everyone to take their turn speaking
- make eye contact
- learn forward a little
- nod and make responsive facial expressions
- say "yeah" or "wow"
- when they're finished speaking (don't interrupt!), rephrase what they said briefly or say a few words of agreement
- don't overdo it, this is an OR list, not an AND list
- think about how you feel when something really interesting is happening, and try to make that feeling exist in your face and body
- this is why the facilitator shouldn't be the one taking notes

tell your neighbor what you're doing at work that interests you

exercise: everyone turn to the person next to you and tell them something you did recently at work that you find interesting, in about three sentences. Person who is listening practices being engaged. Then switch places.

How did that feel? What did you notice?

who's talking? who isn't?

as the facilitator, one of your jobs is to make sure that everyone gets a chance to speak, even if they have nothing to say

don't assume that just because a person is silent, it means they have nothing to say they may be shy or having a hard time interjecting

keep an eye on the participants to see who might want to speak but be afraid to interrupt

things to watch for:

- wiggling
- leaning forward
- licking lips
- biting lips
- waving their hand
- lips pursed as if ready to speak
- frowning/nodding/other engaged facial expressions

Take time to stop the discussion and ask people who have been silent whether they have anything to say, by name

do this partway through and at the end if you can

let's talk about humor

job 3: not screwing this part up

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It is really really easy to mess up when making jokes in a retro

You may have heard the saying "comedy is tragedy plus time". In a retro there has **not been enough time.**

Furthermore, someone (maybe everyone) in that retro feels like they screwed up and cost the company money, their teammates' time (and maybe sleep), and made everyone present have yet another meeting

And probably their manager is there too

anything that makes anyone in the room feel even a little bit uncomfortable, even if they don't really notice or aren't willing to tell you

getting it wrong means "anything that makes anyone in the room feel even a little bit uncomfortable, even if they don't really notice it or won't admit it to you"

some bad jokes

- anything your parents say when they're mad or they think you haven't come home recently enough
- anything you say back to them
- anything a manager or other employee ever said to you that made you feel bad
- anything you ever said to a coworker that made them laugh uncomfortably or wince
- jokes about getting fired or firing people
- politics
- religion
- current events

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things I shouldn't have to mention

- race
- gender
- sexuality
- fat jokes
- jokes about disabilities
- "crazy"
- jokes about any one person or their decisions or their wisdom or their plans or their face

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you can probably make jokes about

- murphy's law
- entropy
- the general terribleness of computers
- the terribleness of getting paged
- being utterly serious about silly things ("Las Vegas, colloquially known as "fabulous"")
- MAYBE you can joke WITH a person about something they are proud of about themselves

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If you knew that I liked making jokes about myself as "the girl with her hair on fire", you could probably make that joke and it would be okay
If you DIDN'T know that I made that joke myself, you should not do it, because in that case no one can be sure that you mean it in a flattering way

but Courtney, if I can't make jokes, how can I lighten the mood?

you can be kind
you can be thoughtful
you can be caring
you can call out successes
you can thank someone for their honesty

you can be warm and welcoming

what about when things go wrong?

what do you do when other people blame or make bad jokes? what about when you make a mistake?

if you mess up

if you make a bad joke or accidentally say something blamey or you can tell you've made someone uncomfortable

apologize, correct yourself and move on
it's important to be sincere but matter-of-fact
wallowing is self-blame and it's uncomfortable, time-consuming, and part of what you're trying to avoid

you don't have to be witty

If someone else messes up, you don't have to be witty
don't try to be clever, don't try to make a joke yourself
you don't need to one-up anyone or "win"
your goal is to remind people of the ground rules and why we're here

If they ask a blaming question, gently remind them that we're trying to avoid blame
and help them rephrase the question

"please don't make jokes like that here"

"please don't make jokes like that here"

This is all you have to say if someone makes a bad joke.
during the retro (or any other meeting) is NOT the time to try to have a teachable moment or stage an intervention; you don't need to convince anyone of anything, you just need them to stop as quickly as possible so the group can move on

If their joke is something like "I fat-fingered it", where they are blaming themselves, you can say gently say "retrospectives are blameless, and that includes not blaming ourselves" or you can just ask they not make a joke like that in a retro.

Once you've gotten them to stop and the group has moved on, do NOT bring it up again! as far as you are concerned, the issue is addressed and done. If they come to you and ask why it was inappropriate, you can explain if you feel like you want to, or just reiterate that it's inappropriate.

"why didn't you just fix it the last time this happened"

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Exercise: how can we rephrase this?

"i think I remember hearing about this in a previous retrospective, is that right? Do you know why we couldn't fix it last time?"

practice interrupting*
* for a purpose, not just cause

as a facilitator, you'll need to learn how to interrupt individuals for the good of the group and the meeting
it's necessary when people start to rant, complain, blame, or get off topic
this can be super uncomfortable!
remind yourself that **you can't achieve the goals of the retro if this goes unchecked**

the best way to practice is to think about a time you experienced when someone needed to be interrupted and they weren't. Remember how unpleasant and frustrating the result was! Then imagine yourself saying "thanks, teammate, but we're really far afield and we need to come back to the point"
or "everyone working this incident did the best they could, and we're here to figure out what we need to know to help things go better next time"
or even "wait a minute please" to give yourself time to think
Do this gently but firmly- the person you are interrupting will probably even feel good about it in the end

let's go make bigger, more interesting mistakes*

* together <3

In operations, we spend a lot of time feeling like lone heros or warriors- like we're the only people who can understand or appreciate what we do, like there's no one to go for help, maybe even that there's no one to trust.

And it's definitely work to reach out and try to make connections with people who have different roles than we do. It takes patience and listening (in the sense of Miller's Law) and it requires asking the same work of them, whenever we can.

But it's incredibly rewarding! For me, doing this work is what has made it possible for me to stay in this industry. This work is what enables us to have people who do and know completely different things but are truly *on our team*- and it works in the professional space, in the personal space, and in the activist space.

In 2019, we don't need more ways to be divided from our natural allies and peers- we need more ways to connect, and support each other, and make meaningful change together.

Acknowledgements:

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Questions?

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Thanks for listening <3

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