

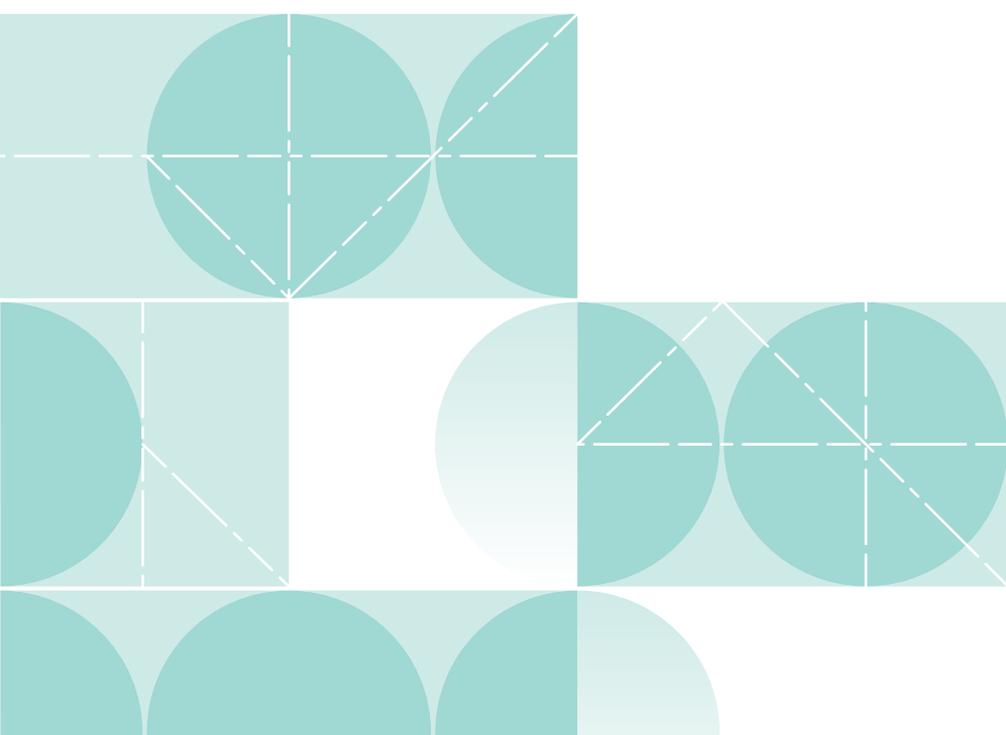


WHITE PAPER

---

# Striking the Right Balance with Balanced Teams

By Jeremy Jarrell and Isabelle Berner



Pivotal<sup>®</sup>

# Table of Contents

<b>Introduction</b>	3
<b>Adding balance to your team</b>	4
<b>Defining the values of a balanced team</b>	5
Create trust	5
Share experiments	6
Celebrate failure	6
Welcome diverse voices	7
<b>Seeing a balanced team in action</b>	8
Creating trust across your organization	8
Welcoming diverse voices into your team	8
Sharing experiments and their results	9
Celebrating failures and the lessons they offer	9
<b>Finding the balance of your own team</b>	10
<b>Putting this into practice with your team</b>	11
<b>The Authors</b>	12

# Introduction

Many teams today have chosen to follow an agile approach to software development. But despite the proven benefits of such an approach, many of these teams are still failing to realize their full potential.

One reason for this is that while these teams may place a priority on perfectly implementing their chosen agile methodology, such as Scrum or Kanban, they neglect to consider the impacts to the human side of those methodologies. There is a science to this, however, and some teams have codified the practices that enable them to work together more effectively, regardless of which methodology they've chosen. One of the most promising of these practices is the Balanced Team.

In this white paper, you'll learn the core values that underlie a Balanced Team approach, as well as the benefits these values can bring to your own team. You'll see how a product development team can employ these values to tackle a familiar problem more effectively; identify the level of balance present in your own team; and learn the steps you can take to improve that balance.

## Adding balance to your team

The Balanced Team [website](#) describes the Balanced Team approach as, “a global movement of people who value multi-disciplinary collaboration and iterative delivery focused on customer value as a source for innovation.”

If you've worked with an agile approach before, then there are likely several themes in the description above that might sound familiar, such as a focus on collaboration across your entire team, or placing a value on iterative delivery throughout the lifetime of the product.

But does that mean that the concept of a balanced team is intended to replace agile? Not at all. A Balanced Team approach can best be thought of as a practice complementary to today's most popular agile approaches. Specifically, it's an approach that places the product-focused team members, such as product managers and designers, on equal footing with the team's technical-focused team members, affording them the same egalitarian benefits that earlier agile approaches afforded developers.

In fact, most organizations that have successfully implemented an agile approach have done so by implementing Balanced Teams alongside other agile and lean approaches, rather than instead of them.

This is because, rather than being a specific methodology with explicitly defined roles, events, and artifacts that must be implemented for that methodology to be considered complete, the Balanced Team approach is instead a set of core values. If your team is already following an agile approach, then they may have taken their first steps toward many of these core values.

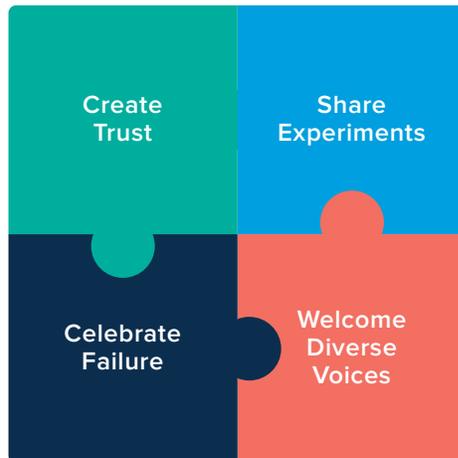
It's this focus on values over practices that allows the Balanced Team methodology to complement any other agile approaches that might already be in place in your organization, rather than to compete with them.

# Defining the values of a balanced team

A Balanced Team approach is built on the pillars of four core values:

1. Create trust
2. Share experiments
3. Celebrate failure
4. Welcome diverse voices

Let's dive into each of these values to help you understand how you can successfully implement a Balanced Team approach with your own team.



## Create trust

Every successful team is built on a foundation of trust, and balanced teams are no different. This is because collaboration is fundamental to the Balanced Team approach and productive collaboration cannot occur until a strong foundation of trust has been established. While there is no one approach that will instantly establish trust on your team, there are many small steps that you can take to begin the process of building the level of trust necessary for your team to be successful.

As Pivotal Labs Designer Peter Wallace suggests, “Get to know people on a personal level. Learn where they came from, what their life outside of work is like, and find out what motivates them in life. You can also build trust by showing that you are vulnerable, willing to learn from your mistakes, and ready to learn together with your team.”

One such step is to establish a culture of a psychological safety both inside and outside the boundaries of your team. Psychological safety encourages the members of your team to take intelligent risks without fear of retribution and grants them the freedom to express their concerns openly and honestly to promote the productive discussion that's necessary for a team to collaborate successfully.

Pivotal's own Design Practice Lead, Becky Hyde, agrees: "The most successful products I've worked on were delivered by teams in which everyone felt they could share any idea, and jump into any conversation. We had so much trust on the team, we were constantly building on each other's ideas, regardless of our role on the team."

Another such step is to demonstrate trust by not only trusting your team members to always act in the best interest of the business, but also trusting those same team members to ask for help when they aren't sure what those interests are. This hands-off approach can sometimes be unnerving for managers who aren't used to granting this level of trust to their teams, but it's a necessary step for giving your team the space they need to work together more effectively.

### Share experiments

High-performing teams know that great products are most often discovered piece by piece, rather than conceived all at once in a lightning bolt of inspiration. That level of discovery can't happen without a healthy dose of experimentation.

Experimentation allows you to test the ways that a specific product change will change user behavior. Experiments begin with a hypothesis and a test designed to validate or invalidate the hypotheses. Product decisions are made based on the outcome of these experiments and sharing these outcomes with the entire team produces collective ownership of the subsequent decision.

Transparently sharing the outcomes of your experiments—whether those outcomes validate or invalidate your original hypothesis—helps to build a shared understanding across your entire team about not only what role your product will play in your customers' lives, but also what capabilities will allow your product to play that role the most successfully. In addition, sharing the results of your experiments also helps to encourage collective ownership of your product's outcome across your entire team, which helps to reinforce that the entire team is wholly responsible for the product's success or failure, rather than any one individual team member.

### Celebrate failure

Building on a practice of healthy experimentation, successful balanced teams know that failure is underrated. While every team ultimately desires to achieve success, no team should discount the immense learning opportunities that can stem from a failed experiment.

Failed experiments not only help your team understand how your product should not behave, but they also protect you from overinvesting in a path that is ultimately doomed. For this reason, the sooner in your product's lifecycle that you can produce failed experiments, the sooner you can get your product off the road to failure and on the road to success. This is because rather than considering these types of outcomes as failures, it's more accurate to think of them as invalidations of your original hypotheses, which in themselves are still positive learning opportunities.

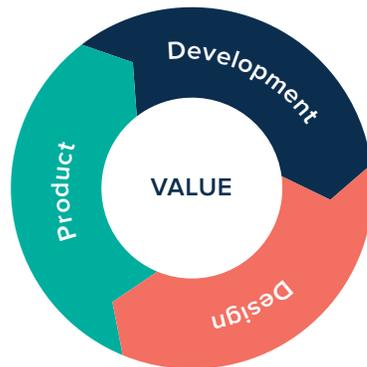
Pivotal Design Practice Lead Becki Hyde agrees: "Failure is inevitable. The work we do is too complex and turbulent to avoid it entirely. When the culture of a team celebrates failure and takes it as an opportunity to learn—rather than avoid—we improve our understanding and avoid making the same failures over again."

It's the exceptional learning opportunities that embracing failure can provide that result in balanced teams viewing failed experiments with delight rather than derision.

## Welcome diverse voices

The last value that's fundamental to a Balanced Team approach is to welcome diverse voices into the chorus of your team. At first glance, this may sound as simple as ensuring that all team members are invited to provide input into your product's direction, despite their role or skillset.

For example, balanced teams encourage developers to contribute to defining the user experience while also encouraging designers to provide input into the team's choice of a technology stack. This collaboration helps to ensure the entire team is better equipped to bring the product to life in a way that's most closely aligned to its guiding vision.



But welcoming diverse voices goes deeper than merely giving everyone on the team a voice. Teams that welcome diverse voices also welcome those voices that may dissent with the de facto direction of the product or contrarian to team consensus.

As an extension of psychological safety, encouraging all team members to openly and honestly share their thoughts, even when those thoughts run counter to others on the team, can not only encourage more open and productive collaboration across the team, but it can also uncover significant risks or concerns that may have otherwise been overlooked until it was too late.

## Seeing a balanced team in action

While an explanation of the core values is informative, to truly appreciate the value that a balanced team can bring, you need to see this approach in action. Let's take a look at a typical scenario most teams are familiar with through the lens of a balanced team: planning the next release of your product.

### Creating trust across your organization

Imagine that you're a product manager tasked with defining the next release of your organization's most successful product. This product is one of your organization's most significant sources of revenue, and many in your organization have opinions regarding which features must appear in the next version.

Rather than forcing these opinions on you, however, your organization recognizes that, as the individual who most often interacts with its most valuable customers, you are best suited to understand the needs of those customers. Therefore, in a nod to creating trust, your organization grants you the freedom to define the features that you believe will be the most impactful to both your product and your users.

### Welcoming diverse voices into your team

However, rather than defining those features in isolation, you decide instead to involve your entire team in the discussion. This exercise in **welcoming diverse voices** not only creates the opportunity for additional perspectives and insights into what features will yield the most success, but it also allows you to tap into the unique expertise of those on your team whose skills differ from your own.

For example, can your technical team members share emerging technological innovations that may enable you to solve problems for your customers in ways that weren't previously possible? Or have your team's designers identified recent trends in user experience that may point to a more engaging way for your users to interact with your product, further differentiating you from your competitors?

Software developer Steve Solomon shares a story of how diverse voices saved his team a lot of unnecessary work: "I was on a team where we were sending customer emails, containing details about their accounts over the last week. At an early stage of the project, the product managers only had a button that allowed them to send all customers in our test group an email for the week. A user story appeared in the backlog that asked us to build a complex screen that would show various aspects of the customers accounts. This prompted me to have a conversation with our PMs and designers. Through the course of the conversation, they expressed their uneasiness in not knowing what the customers would see. With this in mind, I recommended a solution that already existed—it was an email preview endpoint. Making this endpoint available to the team behind a protected section of the website allowed them to preview the emails before sending, and gave our team the confidence they needed without a high cost.

"This is one of the benefits of a balanced team: by putting our heads together, we can solve problems in ways that we would never think of on our own."

By taking advantage of the deep expertise already present on your team to identify new capabilities that have emerged since your last release, and then identifying where those capabilities might intersect with the unique needs of your business, you can define a more compelling version of your product than you otherwise could have by acting alone.

## Sharing experiments and their results

Equipped with a rich backlog of potential capabilities garnered from a diverse set of perspectives and skills, you now have a robust list of features for your product's next release, sure to further its growth in the marketplace.

But do you simply plow ahead, implementing every feature on your list? Of course not. Your next challenge is to design a set of experiments to validate which features are likely to make the greatest impact in your product, which features you should reconsideration in the future, and which features, upon further inspection, simply don't make the cut.

Whatever form your experiments take—whether they be simple customer interviews, lightweight product prototypes, or actually shipping a lean version of a feature to a subset of users—investing in these experiments will winnow your list of candidate features down to only those features whose underlying hypotheses have proven valid. These experiments will enable your team to move forward with the confidence that the work they're doing is the work that has the greatest potential to push your product forward in the marketplace.

However, simply performing the experiments isn't enough. To truly get the most value from them, you must encourage a culture of **sharing experiments** so that the results of those experiments will be shared with with your team. This deeper understanding of your product direction allows your team to make better-informed decisions at the time of delivery, since they'll have insight into which hypotheses proved fruitful. It also encourages a sense of collective ownership of your product's desired outcomes and fosters shared accountability of progress towards those outcomes.

## Celebrating failures and the lessons they offer

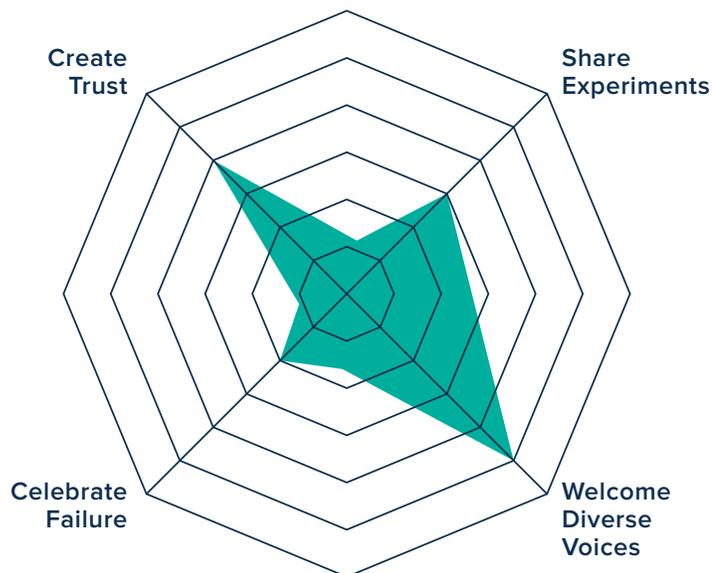
However, remember that sharing the results of these experiments is more than simply sharing your successes. To create true transparency across your organization, you must also share the results of your **failed** experiments. But rather than serve as a source of embarrassment, you should make a habit of **celebrating failures** as the valuable learning experiences that they are.

The early discovery of which potential product features are likely to fail immediately will take these options off of the table so your team can focus its efforts towards those features that are likely to yield a more fruitful path. But more importantly, they also save your team from investing precious time and effort into a path that's doomed to fail.

## Finding the balance of your own team

If the Balanced Team approach sounds promising, then you might consider putting it into practice with your own team. Luckily, regardless of which specific agile framework your team follows, you can still achieve the benefits that stem from becoming a balanced team.

But the journey to becoming a balanced team begins with first understanding where your team is today. The best way to discover that is by evaluating your team against the four core values of a balanced team.



For example, how adept is your team at creating an environment of trust? Do your team members find themselves constantly seeking approval for their decisions from those less involved with the product, or are they empowered to make the right decisions for your product and its users with little oversight from management?

What about your process for making key product decisions? Are those decisions based simply on gut instinct, or are they driven by a process of rigorous experimentation. And furthermore, are the results of those experiments made available to the entire team...even when those results are not quite what you expected?

And in the event that those results aren't what you'd hoped for, are those results quickly swept under the rug for fear of discovery—or are they treated as the valuable learning experiences that they are?

Product Manager Sam Dawson shares: "I think an important aspect of the balanced team is balanced conversation: does the team create a space where each member is expected to and feels safe to contribute? If you look at how much each member of the team participates in conversation...when each person speaks roughly the same amount, this is a sign of a balanced team."

Finally, are your key product decisions made solely by a single individual or is everyone on your team given a voice in those decisions, regardless of their professional background and skill set? And are each of those team members free to express their opinion, even when that opinion differs from others?

## Putting this into practice with your team

Once you've identified how well your team aligns to the values of a balanced team today, as well as what opportunities for improvement might still exist, you can start taking the steps necessary to close those gaps. But remember, for your team to achieve a true Balanced Team approach, all four values must be exhibited in concert by your team.

Regardless of what agile approach your team has chosen, working as a balanced team will help you maximize your team's potential and ensure the delivery of great products to your users, as well as incredible value to your organization

## The Authors

**Jeremy Jarrell** is an agile coach who helps teams get better at doing what they love. When he's not working one-on-one with agile teams, Jeremy loves to write on all things agile. You can read more of his thoughts at [www.jeremyjarrell.com](http://www.jeremyjarrell.com), or follow him on Twitter @jeremyjarrell.

**Isabelle Berner** is a product manager for Pivotal Labs, a software development consultancy specialized in lean and agile. She has worked as a product manager for over 10 years, primarily for fintech startups such as Current, Betterment, and TagPay.