

Liberating Structures – an Antidote to Zombie Scrum

By Barry Overeem, Johannes Schartau, and Christiaan Verwijs

Key Takeaways

- Scrum is huge! It's been massively adopted by organizations and has become *the* software development framework of choice.
- Many organizations and teams think they're doing Scrum, when in reality they're not even close. They've got all the Scrum roles, events, and artifacts in place, but fail to meet their potential.
- The number one cause of Zombie Scrum is that most organizations and teams don't have a clue as to *why* they are doing Scrum.
- There are multiple antidotes available to prevent and fix Zombie Scrum. Liberating Structures is an example of such an antidote to Zombie Scrum.
- Stop Zombie Scrum in your organization by making the current situation painfully transparent. Join the Zombie Scrum resistance, invent new and use existing antidotes to Zombie Scrum, and discover the true potential of the Scrum framework!

Introduction

Scrum is a simple, yet sufficient framework for complex product delivery. It helps organizations thrive on complexity. Scrum provides the minimal boundaries for teams to self-organize and solve complex problems with an empirical approach.

However, we've noticed that although many organizations use Scrum, the majority struggle to grasp both the purpose of Scrum as well as its benefits. Instead of increasing their organizational agility and delivering value to customers sooner, they achieve the opposite. We've come to call this Zombie Scrum; something that looks like Scrum from a distance, but you quickly notice that things are amiss when you move closer. There is no beating heart of valuable and working software, customers are not involved, and there is no drive to improve nor room for self-organization.

One antidote we've found helpful is to rethink how teams interact, both within the team as well as with stakeholders and the broader organization. For this, we found help in Liberating Structures. Rooted in complexity science and based on simple recipes that allow everyone to be involved and



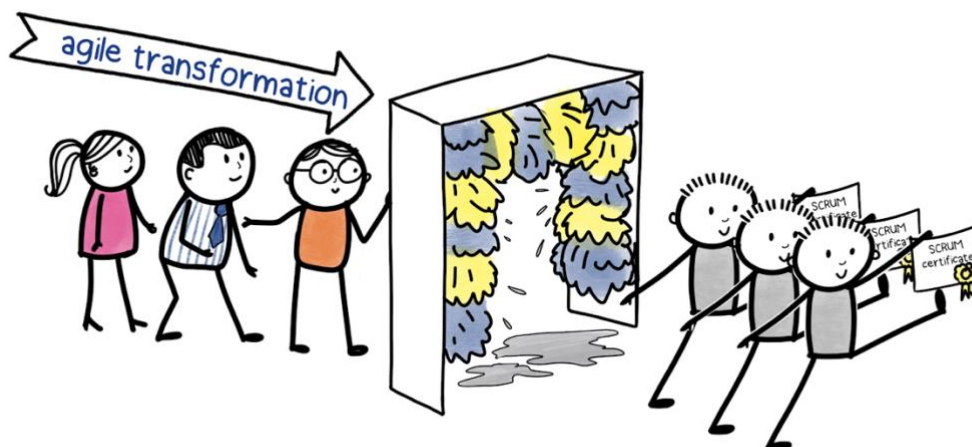
unleashed, we've found them helpful to promote a fast-paced interaction, self-organization, high involvement, radical transparency, and creative destruction that we feel are vital to Scrum.

This article describes what Zombie Scrum is about and gives you tangible examples of how to recognize, treat, and prevent Zombie Scrum by using Liberating Structures.

The State of Scrum

Scrum is huge! It's widely adopted by organizations. Worldwide, there are hundreds of Scrum.org Professional Scrum Trainers (PSTs). Probably more than a million people are certified through one of the official Scrum institutes. Countless books and articles on Scrum have been written and every country has its own user group. Scrum has become *the* framework of choice for many organizations, each following their own promise of increased agility and faster delivery.

This is inspiring and is a cause for celebration. However, we've noticed that while many organizations and teams think they're doing Scrum, they're only touching the surface of what is possible. Most are stuck in painful mediocrity and struggle to find their way out, and we feel that our community is not taking enough responsibility in helping them get out.



For one, many organizations and teams think they're doing Scrum by having all the roles, events, and artifacts in place, certified and all. And there's a slew of coaches around to help them. But all these changes are superficial if there's no working and valuable software at the end of *each* Sprint, ready to be delivered to stakeholders. All these roles are useless when there's no drive to improve anything and no involvement from customers and users during development.

Here is one example: a couple of years ago we worked for a large financial institute. They had the seemingly perfect transformation plan to rollout 50+ Scrum Teams in one year. Every week, a couple of new Scrum Teams were launched. The organizations buzzed with excitement. "Scrum of Scrums" started. Big room planning sessions were organized. Release Trains were planned. At the end of the year, the transformation plan was completed, and it was time for a big party. The Agile transformation was a success!

However, until that moment, they only used metrics focused on utilization and efficiency. Local optimization was encouraged without taking the bigger picture into account. People were being manipulated, and everyone felt as though they were being monitored and controlled. Although the utilization and efficiency metrics showed good results, everyone felt something was fishy...

Two years after the Agile transformation had kicked off, they started exploring different kinds of metrics. Instead of focusing on efficiency and utilization, they selected metrics that were useful and relevant for measuring the success of the empirical process implemented through the Scrum framework. They started using metrics focused on Agility and on value delivered, such as cycle time, customer satisfaction, team happiness, innovation rate, return on investment, and total defects.

When the first results of these metrics became visible, the whole organization was in a state of shock. Their cycle time had increased, customer satisfaction had worsened, teams were unhappy, the return on investment was very low, the amount of defects seemed to go through the roof, and as a result, there wasn't any time for innovation anymore.

What was going on? They had implemented all parts of the Scrum framework. All the artifacts, roles, and events were in place. They even added some extra practices like Scrum of Scrums and a big room planning... Why wasn't Scrum delivering on its promise?

The answer is that although what they did certainly looked like Scrum from a distance, they actually missed the essence. This is a prime example of [Zombie Scrum](#), and we need to work together as a community to help prevent it. Let's stop going mindlessly through the motions of Scrum, and let's start getting real value, while having serious fun!



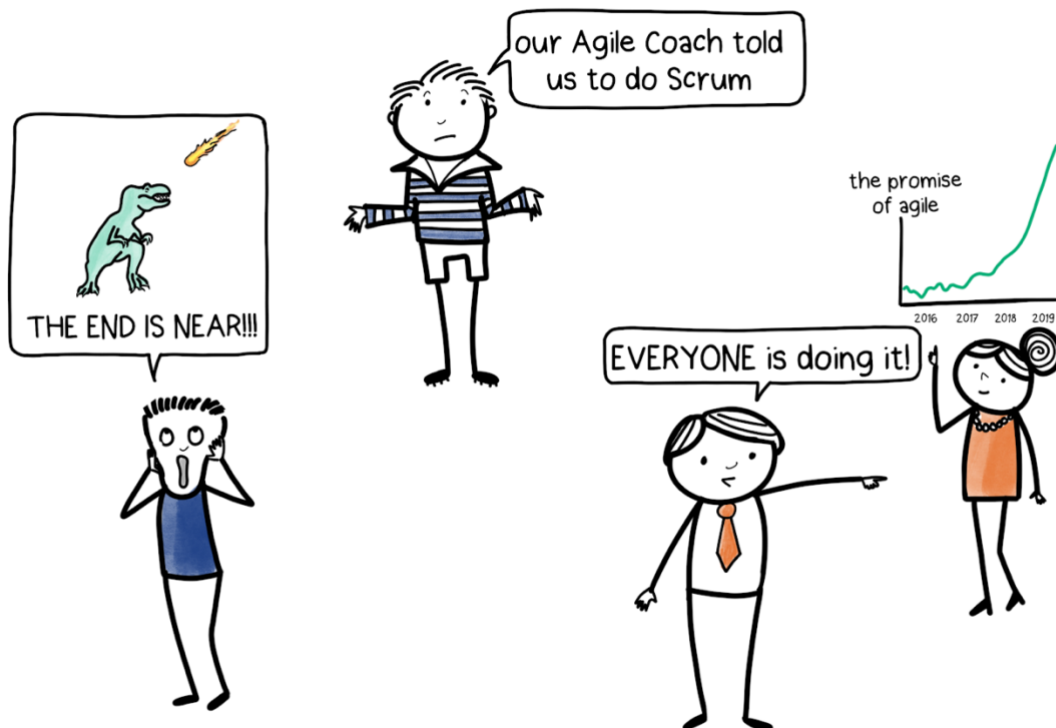
Zombie Scrum

For years, we have done extensive research and studied hundreds of teams and organizations. We've noticed the following patterns:

- Scrum cherry picking: not all the roles, artifacts, and events of the Scrum framework are being used, or teams don't use Sprint Goals because it's too hard.
- Although Scrum is used, contracts remain defined by fixed scope: budget, and planning.
- Scrum teams are not allowed: to use any physical boards to create transparency. Everyone must use the same digital tool with tons of mandatory fields.
- Scrum has become a heavy weight framework: full of "complementary practices" like story points, velocity, and mandatory use of user stories.
- Scrum is scaled throughout the entire organization: without even one team applying it successfully. Or, scaling is done without understanding its purpose, for example, by mindlessly copying the "Spotify Model".

The number one cause of Zombie Scrum, however, is that most organizations and teams don't have a clue as to *why* they are doing Scrum. We often hear reasons like...

- "We are doing Scrum because our Agile Coach said this was a great idea."
- "The CEO was promised an increase in productivity of 400%."
- "All our competitors are using it as well."
- "If we don't increase our agility, we'll become the next Blockbuster or Kodak."



Over the years working with different Scrum Teams and organizations, we've seen that reasons like these don't demonstrate a real understanding of why Scrum and empiricism matter in the first place. Without such understanding, any implementation will remain superficial and flat, as people don't have a good enough reason to persist in the face of the really hard challenges they are bound to face when trying to work empirically. It will just look like Scrum from a distance, but it will not actually help them to learn faster about what works and what doesn't. Nor will it help deliver value to customers more quickly.

Luckily, there's at least one antidote we've found helpful: Liberating Structures.

What Are Liberating Structures?

[Liberating Structures](#) are a collection of interaction patterns that participants learn to unflatten, enrich, and deepen their interactions in groups through. With roots in complexity science, and collected and curated by Keith McCandless, Henri Lipmanowicz, and a thriving community, they were initially developed twenty years ago in response to the stale and non-dynamic nature of interactions in organizations. The founders noticed how purposeless meetings, unengaging presentations, and chaotic brainstorming were often dominated by a few voices. With this, the creative ideas and different perspectives from a silent majority were lost, as was the potential for novel solutions to persistent challenges.

Each Liberating Structure is specified on five design elements and embodies ten principles. Examples of design elements are the way the space is arranged, how participation is distributed, and what

invitation is used to start the interaction. Examples of principles are “include and unleash everyone”, “build trust as you go”, and “learn by failing forward”. New structures are being developed all the time and existing structures are refined or creatively destroyed.

Liberating Structures are simple enough for anyone to learn, and able to “go viral” within organizations as people discover how well they work. By reshaping how people interact, the potential for self-organization and finding break-through solutions is unleashed.

Using Liberating Structures as an Antidote

Liberating Structures fit very naturally within Scrum, as many Scrum Teams have discovered since we started spreading them within our community. They open a wide variety of applications, like problem solving, determining strategies, improving collaboration, and creating shared understanding. When working with Scrum, all of this is relevant. To make this tangible, I’ll give three examples of how we’ve used Liberating Structures as an antidote to Zombie Scrum.

1. Clarifying the purpose of doing Scrum

As mentioned earlier, the number one cause of Zombie Scrum is that many organizations and teams don’t know *why* they are using the Scrum framework. This lack of shared understanding can quickly turn into Zombie Scrum, as people mindlessly go through the process they think is Scrum. Teams only used the mechanics of Scrum because they were told to do so.

Liberating Structures can help organizations with defining a common purpose and strategy, and make working with Scrum a joint effort; not as a one-time trick, but as a continuously recurring activity focused on using Scrum in such a way that it’s tailor-made for your organization.

Liberating Structures that help clarify the purpose of doing Scrum are [Nine Whys](#), [What, So What, Now What](#), and [Critical Uncertainties](#).

Nine Whys

Discover the purpose of your work together as a group

The Liberating Structure Nine Whys helps groups to identify their purpose. It starts by inviting participants to make a list of the activities they are engaging in regarding the task or challenge at hand. It invites them to ask each other why these activities are important. What is it that you’re trying to stop or start? Why is this necessary? What would be missing if you simply did something else? After interviewing each other, encourage everyone to write a short description of their purpose: “My/our work exists in order to...”.

Examples and ideas of how to use it include:

- As part of a Sprint Review to digest and make sense of what was delivered during the past Sprint, any feedback that was received, and to decide on next steps together.
- Together with developers, to determine what strategies to use for optimizing codebases or reduce technical debt.

- To periodically reflect on how the organization is doing in their Agile journey. Invite teams and stakeholders to reflect on the process so far.

Critical Uncertainties

Develop strategies for operating in a range of plausible-yet-unpredictable futures

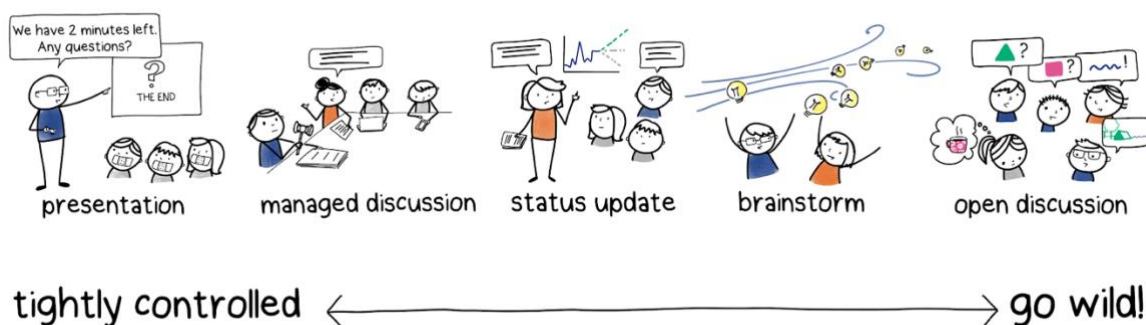
Critical Uncertainties is a concise, collaborative version of scenario planning. Instead of placing all your bets on one (often very optimistic) version of the future and assuming predictability, Critical Uncertainties works with multiple scenarios. This technique helps generate much more robust strategies while providing an excellent tool for collaborative sensemaking.

Examples and ideas of how to use it include:

- Supporting the Product Owner in testing the viability of its product strategy. This helps expose assumptions and uncertainties and define next steps. Based on the different scenarios, the Product Owner could set Sprint Goals, update the product roadmap, engage with stakeholders, and offer clarity to the Development Team.
- Showing management how to involve everyone in shaping the future of the organization. As a joint effort, the possible scenarios and strategies for how to be successful were determined. This helped develop more organization-wide confidence in managing the unknowable future.
- Growing the self-organizing capabilities of the Scrum Team by having them think of the most critical and uncertain realities they might face. Doing this together not only bonded them as a team, but also allowed them to adapt and change more quickly.

2. Improving the Scrum events

When focusing on the Scrum events, what happens frequently is that they become too structured and inhibiting, with one person talking while the rest “listen” – like during *presentations*, *status meetings*, and *managed discussions*. Or the Scrum events are too unstructured and loose, with only a handful of people talking while the rest struggle to keep up – like during *brainstorms* and *open discussions*.



Examples of how these conventional ways of interaction often manifest in the Scrum events include:

- **The Sprint Review** becomes a boring presentation (demo) given by the Product Owner with stakeholders (if present) as static listeners.

- **The Sprint Planning** results in a managed discussion with the Scrum Master as the chairman discussing the Sprint Backlog in excruciating detail.
- **The Daily Scrum** becomes a dreadful meetup in which the Development Team mechanically answers all the work they've done and are planning to do, without any connection to the Sprint Goal.
- **The Sprint Retrospective** results in a brainstorming and open discussion, continuously identifying the same improvements; let's improve communication and collaboration.

By using Liberating Structures, the full wisdom, experience, and perspectives of the Scrum Team or organization can be used to resolve impediments, make decisions, share knowledge, and innovate. By doing so, it prevents the Scrum events from having these unproductive presentations, status meetings, etc.

Examples of Liberating Structures that will help improve the Scrum events are [Impromptu Networking](#), [Conversation Café](#), and [TRIZ](#).

Impromptu Networking

Rapidly share novel ideas and make personal connections

Impromptu Networking allows a group of any size to form personal connections and share ideas in less than 20 minutes. It invites everyone to participate from the very start and share stories, challenges, or experiences with each other. Not only is it a good way to 'break the ice,' but it also doubles as a clever way to use the collective brainpower of the group to rapidly identify patterns.

Examples and ideas of how to use it include:

- A couple of months ago we facilitated a Sprint Review with a large group of participants. It consisted of several Scrum Teams and about 25 stakeholders. We used Impromptu Networking as an icebreaker exercise and offered them the questions: "If the product was a living, talking entity, what would it say right now? What secrets would you be worried that it might tell? What would you want it to say?" The result was a very fun start to the Sprint Review, which offered some valuable insights as well.
- We recently used it during the Sprint Retrospective by offering the questions: "If you could invite a special guest to the Retrospective, who would you invite?" and "How could you make the next Sprint dramatically worse than the one you have just had?" Of course, these questions are simply examples, yet the exercise will definitely kickstart your retrospective!
- Try Impromptu Networking during the Daily Scrum. In three rounds, each time in different pairs, have a conversation about the progress towards achieving the Sprint Goal. After the three rounds, identify patterns and determine a plan for the upcoming 24 hours.

Conversation Café

Engage everyone in making sense of profound challenges

Conversation Café uses two quick highly structured rounds, one after another, talking very briefly and with a talking object to then lead into a longer, less structured round in which an open conversation can take place. This leads to a totally different kind of engagement and spread of ideas. Conversation

Café concludes with a final round of a structured exchange. Conversation Café helps people have calm and profound conversations in which there is less debating and arguing, and more listening.

Examples and ideas of how to use it include:

- In the Sprint Review, use Conversation Café to make sense of the challenges you're facing with the development of a product. Give everyone the opportunity to share their perspectives and jointly gain insights on how to move forward.
- During the Sprint Retrospective, use Conversation Café to create a safe environment in which every member of the Scrum Team has the opportunity to speak their mind and share worries, anxieties, or positive experiences.
- During the Sprint Planning, use Conversation Café to discuss the objectives the Product Owner has in mind and the work the Development Team needs to do in order to create a Done increment. It helps team members make sense of complexities, difficulties, or unclarity and lay the ground for being able to move on.

TRIZ

Make space for innovation by stopping counterproductive activities and behavior

The Liberating Structure 'TRIZ' invites the creative destruction of activities that limit innovation and productivity. It does so in a cathartic way that is fun, engages and involves everyone, and is bound to create some laughs along the way. This structure was inspired by an element in a problem solving approach created by [Genrich Altshuller](#).

Examples and ideas of how to use it include:

- Use TRIZ during one of the first Sprint Reviews with stakeholders by asking, "What should we do to make this *the* nightmare project in the history of our company?" The result will be a list of activities that often went wrong in previous projects. This triggers a conversation on how to prevent this from happening again.
- During a Sprint Retrospective to stop counterproductive activities and behavior. Invite the team members to make a list of all they could do to guarantee that the upcoming Sprint will be the worst possible Sprint ever! After the Scrum Team has created the list, ask them to be brutally honest and circle the items they already recognize from the previous Sprints. As a final step, help them define improvements to stop these activities.
- Use TRIZ during the Sprint Planning with a focus on delivering a "Done" increment. For the first round, ask, "What can we do to deliver the most un-done Increment imaginable?" Eventually, it will help the team create a more realistic plan for the upcoming Sprint in order to build a "Done" increment.

3. Encouraging Scrum Teams' self-organizational capabilities

In the complex domain, a context's influence is so important that there are no "best practices". Therefore, we prefer the term "complementary practices". Examples of complementary practices are Story Points, User Stories, or doing the Daily Scrum standing. For some teams they're useful, for others they're not. Therefore, it's also up to the Development Team to determine the best way to accomplish

its work and build “Done” increments. Figuring this out requires self-organization. Scrum supports self-organization by offering a lightweight framework that contains only three roles, five events, and three artifacts.

Liberating Structures support self-organization by offering 33 interaction patterns that are specified on five micro-organizing elements:

1. The invitation, the question, or topic you want people to explore
2. How space is arranged and what materials are used
3. How participation is distributed among participants
4. How groups are configured
5. The sequence of steps and the time allocated to each step

As with the Scrum framework, Liberating Structures offer clear boundaries and constraints. It’s up to the participant to self-organize within these constraints. When using Liberating Structures, the Scrum Team is encouraged to explore local solutions that fit their context.

Although we can’t mention all of them, some Liberating Structures that strongly encourage self-organization include [Troika Consulting](#), [Ecocycle Planning](#), and [Improv Prototyping](#).

Troika Consulting

Give and get practical help from peers

Troika Consulting helps people to gain insights on issues they face and unleash local wisdom for addressing them. In rapid rounds of “consultations”, individuals ask for help and get advice immediately from two others. Peer-to-peer coaching helps the “client” in refining their skills in asking for help. They will learn to formulate problems and challenges clearly. It enables the “consultants” to improve their listening and consulting skills. Overall, this structure builds trust within a group through mutual support, builds the capacity to self-organize, and creates conditions for unimagined solutions to emerge.

Examples and ideas of how to use it include:

- During a Sprint Retrospective to facilitate the problem-solving process of the Scrum Team. Gather a list of the problems the team is facing. Divide the Scrum Team into groups of three. One person is the “client”, the other two are “consultants”. The client explains the problem, the consultants listen and offer advice. It encourages the Scrum Team’s self-organizing capabilities by having them think of solutions. As a Scrum Master, you facilitate the entire process.
- As part of backlog refinement to explore upcoming features, risks, or technical challenges with each other and define possible next steps.
- During a Sprint Review to have stakeholders and the Scrum Team gain insights on the issues they face. The goal of a Sprint Review is to collect feedback and to determine the best way to move forward. By using Troika Consulting, you can remove the possible barrier between stakeholders and the Scrum Team and have them jointly explore problems and define solutions.

Ecocycle Planning

Bring clarity and focus in the activities you're doing individually or as a group

The Ecocycle is a powerful concept that helps Scrum Teams engage in meaningful conversations. Any system in nature goes through the phases of Gestation (something is starting to take shape but might not be visible yet), Birth (something has taken form but needs nourishment to provide benefits), Maturity (something is well-established and you profit from it), and Creative Destruction (something has outlived its purpose and needs to either be decomposed or reinvented). By using this metaphor, teams can inspect a variety of topics, look at the progression of individual items and the distribution of items across the whole Ecocycle, and discuss next steps to advance items to the next phase.

Examples and ideas of how to use it include:

- Cleaning up a Product Backlog or an entire portfolio of products together with a representation of (or everyone) involved in the product(s).
- Continuously inspect how strategic ambitions match with the reality of product portfolio distribution on the Ecocycle.
- Plotting the activities that Scrum Teams do and to discover what they should spend more time on, and most importantly, what to let go of.
- Helping Scrum Masters and Product Owners develop themselves. What are they spending a lot of time on that isn't delivering value?

Improv Prototyping

Develop effective solutions to chronic challenges while having serious fun

Improv Prototyping uses the power of bodily re-enactment in an improv theater style. Instead of talking about ideas, the participants get to feel what it's like to actually act them out. First, a scene that needs to be improved is performed in front of everyone. The participants are then invited to develop solutions in small groups. In fast-paced interactions, improvements are made until a satisfactory solution is found.

Examples and ideas of how to use it include:

- We've used this approach to let Scrum Masters act out significant challenges they face when working with Development Teams and explore different strategies and behaviors.
- In our Professional Scrum Master classes, we've used it to let participants enact Scrum events "gone wrong" – like a Daily Scrum that turns into a status meeting – and explore different behaviors and interventions.
- You can use Improv Prototyping during Sprint Retrospectives to help teams find better ways to interact during, and outside of, the Scrum events. You could also use it to explore pair/mob programming and swarming.

Closing Thoughts

The amount of organizations getting affected by Zombie Scrum is increasing rapidly. It's a serious problem that needs to be solved. Luckily, there are multiple antidotes available, Liberating Structures being one of them. Also, there's a strong Scrum community focused on learning and sharing experiences and willing to explore novel solutions to persistent challenges; a community that offers opportunities for deepening skills, developing strategies, and learning new techniques. The strength and influence of a community is determined by its members. Therefore, our hope is that you will join the community, with [The Liberators Network](#) as an example, and help us fight Zombie Scrum!

Want to Learn More?

If you want to learn more about Liberating Structures, the liberatingstructures.com website offers a vast amount of information. If you're interested in how to combine Liberating Structures with Scrum, check out [this series of articles on Liberating Structures](#) we wrote. However, Liberating Structures is something you should experience. Therefore, attending a local [user group](#) or an [Immersion Workshop](#) is strongly recommended.

About the Authors

As the co-founder of [The Liberators](#), Barry Overeem liberates organizations from outdated modes of working and learning. Bringing in fresh energy and creativity, he creates a space for everyone to be involved in shaping the future and making a positive impact. Overeem fights Zombie Scrum together with Johannes Schartau and Christiaan Verwijs. This article was created in close collaboration between the three of them.



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