

BEST PRACTICE

SCRUM

A Smart Travel Companion

A Pocket Guide - 4th edition

Gunther Verheyen

Scrum - A Pocket Guide
4th edition

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Colophon

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Foreword by Ken Schwaber

An outstanding accomplishment that simmers with intelligence.

Scrum – A Pocket Guide is an extraordinarily competent book. Gunther has described everything about Scrum in well-formed, clearly written descriptions that flow with insight, understanding, and perception. Yet, you are never struck by these attributes. You simply benefit from them, later thinking, “That was really, really helpful. I found what I needed to know, readily understood what I wanted, and wasn’t bothered by irrelevancies.”

I have struggled to write this foreword. I feel the foreword should be as well-written as the book it describes. In this case, that is hard. Read Gunther’s book. Read it in part, or read it in whole. You will be satisfied.

Scrum is simple, but complete and competent in addressing complex problems. Gunther’s pocket guide is complete and competent in addressing understanding a simple framework for addressing complex problems, Scrum.

Ken, 22 August 2013

Preface

The use of lightweight, Agile methods continues to gain traction with Scrum being the most widely adopted framework. The general level of interest in Scrum is already huge and still its use keeps expanding, in and beyond software and (new) product development.

Transforming an organization's way of working to Scrum represents quite a challenge. Scrum is not a cookbook 'process' with detailed and exhaustive prescriptions for every imaginable situation. Scrum is a lightweight *framework* of principles, rules and values that thrives on the *people* employing Scrum. A major potential of Scrum is that it forms the stable foundation for the discovery and *emergence* of practices, tools and techniques and optimizing them for a specific context.

The benefits realized through Scrum depend on the will to remove barriers, think across walls and separations and embark on a journey of discovery.

That journey implies understanding the rules of Scrum to know how the game is played. Although there is ultimately nothing more powerful to learn Scrum than by going out and playing, this book also aspires to be your companion along the way, all the way. This book shows how Scrum implements the Agile mindset, what the rules of the game of Scrum are and how these rules leave room for a variety of tactics to play the game. The

ambition of describing all these aspects is to make this book worthwhile for people, teams, managers and change agents regardless of whether they are already doing Scrum or want to embark on their journey of Scrum.

My own journey took off in 2003 with eXtreme Programming wrapped in Scrum and has inevitably been a cobblestone path. I have used Scrum with many teams, in various projects and initiatives, at different scales and at different organizations. I have worked with large and small enterprises and I have coached individual practitioners and teams as well as executive management. I have partnered with Ken Schwaber, co-creator of Scrum, while shepherding the ‘Professional Scrum’ trainings, courseware and assessments of Scrum.org. I am gratified that in 2016 I was able to continue my journey of humanizing the workplace with Scrum as an independent Scrum Caretaker.

In the meantime, evolving this book has turned into a journey in itself. I created the first edition in 2013. I remember how I described the Scrum Values in that first edition. In 2016 they were added to the Scrum Guide. In that first edition I also pointed out that the traditional three questions of the Daily Scrum are a good, but optional tactic. That optionality was added to the Scrum Guide in 2017 and the questions were not mentioned anymore in the 2020 edition, taking away all doubt that they are indeed optional.

However, more and bigger challenges keep surfacing. The balance of society keeps drastically and rapidly shifting from industrial (often physical) labor to digital (often virtual) work. In many domains of society, the unpredictability of work increases incessantly. The industrial paradigm is rendered useless, definitely, for many types of work. The need for the Agile paradigm is bigger than ever, and thus the need for a tangible framework like Scrum to help people and organizations increase their agility in performing complex work in complex circumstances.

Scrum is increasingly being discovered and appreciated as this *'empirical framework that enables people to derive value from complex challenges'*, more than as only a way to deliver (software) products. More and different people ask for guidance on their journey of Scrum, often in domains beyond software and new product development. It required a more generic description of the rules of Scrum, different words, other angles to the known set of rules. This is why I created the second edition of this book in 2019.

The focus of the third edition (2021) remained on clarifying the intent and purpose of the rules and roles in the framework, but it also introduced some changes in terminology. I learned from my readers that when Scrum is explained from its roots in software development it makes sense for people in other domains. I have learned from my readers that my book offers the, more than ever needed, foundational insights for people and their organizations to properly shape their Scrum, regardless of their domain or business.

Yet, as the 'doctrine of improbability' says: "There must be a better way."

My initial ambition with this fourth edition was to slightly improve the cohesion of my description of the rules of the game. This is reflected in my revised Scrum Game Board: all aspects of Scrum are now captured in that one visual (section 2.5). I obviously could not resist making some small updates and edits to what I wrote before, even to the parts I thought I would never touch again. It resulted in a complete update with much more refinements than originally anticipated and even a new section ("eXtreme Development", section 3.6). I am continuously uncovering better ways of explaining Scrum. . .

I thank Ken Schwaber for the foreword and his review for the original (2013) edition and all other reviewers for their much-appreciated feedback on the subsequent editions. I thank all translators for their past and

on-going efforts to spread my words in different languages. I thank all at Van Haren Publishing, and especially Ivo van Haren, for allowing me to express my independent Scrum Caretaker view on Scrum.

Enjoy reading.

Gunther

independent Scrum Caretaker

June 2013, August 2018, November 2020, May 2024

Reviews

This Scrum Pocket Guide is outstanding. It is well organized, well written, and the content is excellent. This should be the de facto standard handout for all looking for a complete, yet clear overview of Scrum.

(Ken Schwaber, Scrum co-creator, August 2013)

Gunther has expertly packaged the right no-nonsense guidance for teams seeking agility, without a drop of hyperbole. This is the book about agility with Scrum I wish I had written.

(David Starr, Agile Craftsman, June 2013)

During my many Scrum training activities I often get asked: “For Scrum, what is the one book to read?” In the past the answer wasn’t straightforward, but now it is! The Scrum Pocket Guide is the one book to read when starting with Scrum. It is a concise, yet complete and passionate reference about Scrum.

(Ralph Jocham, Agile Professional, June 2013)

“The house of Scrum is a warm house. It’s a house where people are WELCOME.” Gunther’s passion for Scrum and its players is evident in his work and in each chapter of this book. He explains the Agile paradigm, lays out the Scrum framework and then discusses the ‘future state of Scrum.’ Intimately, in about 100 pages.

(Patricia M. Kong, Business Agility Enterprise Solutions, June 2013)

I recommend reading *Scrum – A Pocket Guide* early in your Scrum journey to help you gain a deeper understanding of why Scrum works and how the values and principles can positively impact the lives of your team as well as the health of an organization. Reading it later in your journey is great too... except for the feeling of regret wishing you had read it earlier.

(Blake McMillan, Principal Consultant, August 2018)

It is hard to find concise, to the point literature about Scrum. Most authors circle around the core topics instead of naming them. Gunther chose to break this pattern, enlightening us with the knowledge of the truly important parts of Scrum. When starting on your Scrum journey, make sure to take a copy of this guide along with you.

(Dominik Maximini, Agile Leadership Coach, August 2018)

“Small in size, big on value.” Gunther’s pocket guide to Scrum is one of the few books that I possess in both hardcopy and e-book format so that I have it with me all the time. It is a good read and a great companion to the Scrum Guide. Highly recommended for ambitious travelers!

(Bhuvan Misra, Agile Mason, November 2020)

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1

The Agile Paradigm

1.1 TO SHIFT OR NOT TO SHIFT

The software industry was for a long time dominated by a paradigm of *industrial* views and beliefs, based on and consisting of old manufacturing routines and theories. An essential element in this landscape of beliefs, views and practices was the Taylorist¹ conviction that ‘workers’ can’t be trusted to intelligently, autonomously and creatively perform their work. Such ‘workers’ are expected to do no more than carry out pre-defined executable tasks. Their work must be prepared, designed and planned by more senior staff. And then still, hierarchical supervisors are expected to vigilantly oversee the execution of these carefully prepared tasks. *People are*

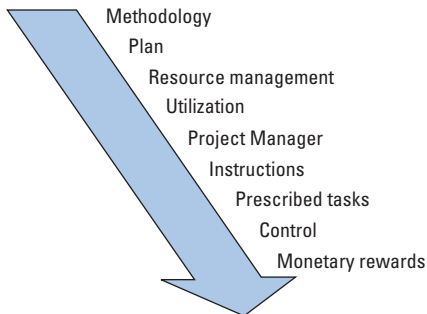


Figure 1.1 The Industrial Paradigm