

It's Not Just Standing Up: Patterns for Daily Stand-up Meetings

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Introduction

The daily stand-up meeting is simple to describe: the whole team meets every day for a quick status update. This short definition does not, however, sufficiently communicate the subtle details that distinguish between an effective and sub-optimal implementation of the practice.

People who have experienced effective stand-ups will generally know what should be adjusted to improve a bad one. This is much more difficult for people with limited stand-up experience to reflect upon. This paper is an attempt to alleviate this difficulty by describing the benefits and consequences of common practices for daily stand-ups. They are intended to help direct the experimentation and adjustment of new practitioners as well as provide points of reflection to experienced practitioners.

Goals of Daily Stand-up Meetings

Summarizing several papers and references ([Anderson, 2002], [Beedle et al., 2000], [OrgPatterns, 2003], [Rising, 2002], [Rising and Janoff, 2002], [Wells, 1999]) daily stand-ups should achieve the following goals:

- communicate daily status, progress, and plans to the team and any observers,
- identify obstacles more quickly so that the team can take steps to remove them,
- set focus for the rest of the day,
- increase team building and socialization.

Communicate daily status

"The focus of the meetings is on the technical progress in the architecture and the work plan."
[OrgPatterns, 2003]

This is probably the most easily remembered goal for daily stand-ups. This is also not really much of a differentiator against any other kind of status meeting. The mechanism that stand-ups use for communicating the status **is** a differentiator. Perhaps the key value of requiring daily status is what it requires of the participants: daily reflection.

Identify obstacles and therefore provide opportunities for assistance

"When one team member shares an obstacle in the Scrum meeting, the entire team's resources come together to bear on that problem. Because the team is working together toward a shared goal, every team member must cooperate to reach that goal. The entire team immediately owns any one individual's problems." [Rising and Janoff, 2000]

Raising and removing obstacles earlier allows the team to work more effectively earlier. The stand-up itself is not intended to remove any particular obstacle but rather to provide a forum for participants to identify obstacles so that other participants have the opportunity to provide assistance.

Set focus

"During the daily meetings, the Scrum master would call attention to backlog item priority. This was especially helpful for new team members, who might have gone off in another direction." [Rising and Janoff, 2000]

The goal is to get everyone moving in the same direction. The stand-up is used to continually remind the team what that direction is.

Increase Team Building and Socialization

More so than artificial “team-building” exercises, regularly communicating, working, and helping each other builds effective teams. This is also strongly tied with team members opportunistically assisting each other with raised obstacles.

Essentially, the team is aware of any particular member's problems because they hear about it every day (until the problem is solved). The environment is amenable for people to raise problems as a history develops of team members helping each other solve past raised problems.

The Feel of an Effective Daily Stand-up

Technically, the meeting is a “daily stand-up” if everyone is standing up and the meeting is held every day. However, there is a different “feel” to a well-run stand-up that distinguishes it from an empty ritual.

The original description of daily stand-up meetings called them Daily Scrums [Beedle et al., 2000] with an intentional association to the rugby term. The energy level of a daily stand-up should perhaps not be quite as high as that of a rugby scrum but it should still feel energizing. **Quickness** and **high energy** support the goal of setting focus. Long, low-energy meetings tend to distract and mute the day.

Well run stand-ups will feel **supportive**. When people are knocked down every time they raise a problem, they will tend to stop raising problems. Beyond preventing removal of obstacles, a non-supportive stand-up works against team-building and socialization. It becomes a ritual that team members dread [LaPlante, 2003].

When things are going right, there isn't much direction or facilitation of the stand-up. It tends to be more **self-organising**. This is really more a side-effect of an effective, motivated team.

Patterns

In-lined phrases in all capitals refer to pattern names while bold phrases refer to smells described in the following section.

ALL HANDS

People and representatives from various areas wish to know about and/or contribute to the status and progress of the project. Communicating status in multiple meetings and reports requires a lot of duplicate effort.

Therefore

Replace some or all of the meetings and reports with the daily stand-up. Anyone who is directly involved in or wants to know about the day-to-day operation of the project should attend the single daily stand-up meeting.

But

People not directly involved can disrupt the stand-up (See **PIGS AND CHICKENS**). This suggests that another forum would still be required for queries outside the scope of the stand-up.

Too many people in the meeting may cause disruption and/or cause people to be uncomfortable in sharing information. For very large stand-up groups, it is even more important to follow **PIGS AND CHICKENS** and **TAKE IT OFFLINE** in order to ensure all contributors can provide their input in a timely fashion.

Not all forms of reporting will be, nor should be, covered by the stand-up format. For example, overall project progress would be better communicated with a “big visible chart” [Jeffries, 2004] such as burn-down, burn-up, cumulative flow diagram, etc. As a side-effect, some otherwise participants of the stand-up may be receiving sufficient information from the chart that they don't need to attend the stand-up regularly.

PIGS AND CHICKENS

*A chicken and a pig are together when the chicken says, "Let's start a restaurant!".
The pig thinks it over and says, "What would we call this restaurant?".*

*The chicken says, "Ham n' Eggs!".
The pig says, "No thanks, I'd be committed, but you'd only be involved!".
[Schwaber and Beedle, 2001]*

During a stand-up, interference by observers causes disruption in the communication within the team. Such interference may be in the form of interruptions or simply by participating and providing inappropriate information. If the interference is severe enough, the team members may not bother using the stand-up to communicate project issues and either create an alternate medium or not communicate at all.

But excluding observers from participation might deprive them of information they legitimately need.

Therefore

Institute a rule where only “pigs” participate and “chickens” are only allowed to observe.

“Pigs” are people who have committed to the completion of the current iteration (i.e., developers, testers, immediate managers, etc.). In other words, people who can say something that directly affects the delivery of backlog items/features/stories. “Chickens” are other people who may be interested in the status of the iteration but have not committed to its completion. This could be other managers, sales staff, developers from other projects, etc. Any questions and issues that “chickens” have can be resolved after the meeting (**TAKE IT OFFLINE**) or communicated in a different medium.

But

Emphasizing too much distinction between the types of meeting attendees risks creating an adversarial relationship. It's not that observers are not allowed to communicate with the team; it is just that such communication is inappropriate during the daily stand-up.

CLOSE THE CIRCLE

Volume of speech affects attentiveness as well as effectiveness of communication. Physical distance changes the level of volume required to communicate well. Some people don't speak loudly and don't feel comfortable doing so.

Therefore

CLOSE THE CIRCLE. The stand-up should be more of a huddle, than a meeting. If it's difficult to hear, bring everyone closer. Beyond allowing for a more relaxed speaking volume, being physically closer tends to cause participants to be more attentive on its own. Being able to stand physically closer is also an expression of greater trust within the team.

If the stand-up is a new thing, it's usually enough to use hand gestures to wave people in and say something to the effect of “Let's bring it in”. If the size of the circle has been established for a while, I would suggest explaining the reasons for closing the circle before trying to implement it.

But

Participants may be uncomfortable moving closer together for various valid reasons, whether cultural, personal or otherwise. Even on a very trusting team, there is a point when people are just standing too close for comfort. Symptoms tend to be participants that are tense and/or fidgety.

START AT THE SAME TIME

We want the team to have a sense of ownership of the stand-up. We also want interested parties to be able to drop by to observe a stand-up to avoid having to schedule yet another status meeting. This is difficult if any particular team member is allowed to force a delay of the stand-up.

Therefore

Start the daily stand-up at the same time every day. Do not wait for stragglers, including architects and managers. The meeting is for the whole team, not for any particular individual. This is especially important if you **USE THE STAND-UP TO START THE DAY.**

The key advantage is that consistent times allow “chickens” (See **PIGS AND CHICKENS**) to opportunistically drop by to observe rather than schedule yet another status meeting.

But

START AT THE SAME TIME is not intended to be blindly inflexible. The important thing is for the start time to be mostly consistent and rescheduling to be rare. If rescheduling is required often, it may be an indication that the start time should change.

USE THE STAND-UP TO START THE DAY

The daily stand-up meeting provides focus and awareness of outstanding issues. If it occurs late in the day, this focus and awareness is wasted.

Therefore

USE THE STAND-UP TO START THE DAY.

With flexible work hours, not every team member will arrive at work at the same time. A common practice with “flex-time” is to use a set of core working hours. The start time should be at the start of these core working hours. Similarly, if team members need to arrive later for personal reasons (e.g., need to drop off kids at school), the start time should be set at a time so that everyone can attend.

But

There is usually a tendency not to work on any project-related tasks until the stand-up. If the **Stand-up Meeting Starts the Day... Late**, this slack time may be significant. To some extent, this may simply be used as an opportunity to check e-mail, fill in timesheets, etc. but it may be worth investigating removing the stand-up as a “start of day” ritual by scheduling it later in the day.

DON'T USE THE STAND-UP TO START THE DAY

The stand-up tends to serve as the ritual to set focus for the day, especially if you **USE THE STAND-UP TO START THE DAY**. Because of this, team members tend not to work on features until the stand-up. When the meeting is not actually held first thing, this tendency may have a significant impact on project delivery.

Therefore

DON'T USE THE STAND-UP TO START THE DAY. Schedule the daily stand-up meeting far enough into the day that it will not be psychologically associated as starting the day.

But

There is now no longer any shared ritual to set team focus to start the day. Depending on the team, this price may not be worth the apparent increase in efficiency.

When there are many project using stand-ups, it is possible that multiple stand-ups are occurring simultaneously. Observers interested in multiple projects may want to change stand-up times to allow them to be able attend. This is problematic since it risks the sense of ownership for the “pigs” if a “chicken” can force a stand-up to adjust to his/her schedule. Nevertheless, this must also be a consideration when deciding when to have the daily stand-up.

STAND UP

Some people are talkative and tend to wander off into **Story Telling**. Some people want to engage in **Problem Solving** immediately after hearing a problem. Meetings that take too long tend to have low-energy and participants not directly related to a long discussion will tend to be distracted.

Therefore

Require that all attendees **STAND UP**. Sitting is a comfortable position that disinclines both mental and physical movement. Use standing up to link physical with mental readiness. Physical discomfort will also remind attendees when a meeting is taking too long. A simple way of encouraging this is to simply hold the meeting where there are no chairs.

But

Standing up only tends to cause meetings to shorten. It does not guarantee that they will shorten to an optimal length. People may learn to cope with the discomfort instead of taking a more appropriate response. Also if the meetings are **not** taking too long nor wandering off-topic, standing up is an unnecessary ritual.

See also **FIFTEEN MINUTES OR LESS**, **TAKE IT OFFLINE**, and **TIME THE MEETINGS**.

YESTERDAY OBSTACLES TODAY OTHER

Some people are talkative and tend to wander off into **Story Telling**. Some people want to engage in **Problem Solving** immediately after hearing a problem. Meetings that take too long tend to have low-energy and participants not directly related to a long discussion will tend to be distracted.

Therefore

Structure the contributions using the following format:

- What did I do yesterday?
- What obstacles do I have?
- What am I going to do today?
- What else should the team know about?

These are the minimum number of questions that satisfy the goals of daily stand-ups.

But

The structure is not as important as the information the answers to the questions provide. If the information is provided in a less structured protocol, it is not important to stick to a checklist.

TAKE IT OFFLINE

Some people want to engage in **Problem Solving** immediately after hearing a problem. Meetings that take too long tend to have low-energy and participants not directly related to a long discussion will tend to be distracted. It is still important to acknowledge that further discussion will be required to solve the raised problem. Some people may find it uncomfortable to enforce the structure of the stand-up by interrupting.

Therefore

Use a simple and consistent phrase like “Take it offline” as a reminder that such discussions should take place outside of the daily stand-up. If the discussion was **Socializing**, nothing more is required. If the discussion was **Problem Solving**, the facilitator (and eventually just the team) should ensure that the right people are nominated or sign up to deal with the issue later.

But

There is a difference between **Problem Solving** and a clarifying question. Information that is not understood is not useful. The extent upon which clarifying questions are allowed should vary depending on how large the team is and whether it will impact **FIFTEEN MINUTES OR LESS**.

FIFTEEN MINUTES OR LESS

Most people will wander mentally when they are in long meetings, especially if it is not a discussion. A long, droning meeting is a horrible, energy-draining way to start the day. A specific number helps remind us when to consider adjustment to reduce the time of the meeting.

Therefore

Keep the daily stand-ups to **FIFTEEN MINUTES OR LESS**. Even shorter is even better. As a general rule, after fifteen minutes, the average person's mind is going to wander which doesn't help with setting focus.

But

Fifteen minutes may even be too long for smaller teams. Because of the mind-wandering effect, even for larger teams, fifteen minutes is a good limit.

TIME THE MEETINGS

It is difficult to qualitatively judge whether a stand-up is taking too long, especially if it only gradually increases in length.

Therefore

TIME THE MEETINGS and publish the results. Most of the time, attendees just don't realise the impact of **Story Telling**, not being prepared to **TAKE IT OFFLINE**, or not preparing have on how long the meeting will take. Make it quantifiable.

But

As with all measures, don't introduce it unless there is an actual goal to accomplish (*i.e.*, increase energy level of the daily stand-up) and a corresponding question that highlights what needs to be done (*i.e.*, how long are the meetings actually taking). Once the goal is accomplished, drop the measurement. This is a simplification of the Goal Question Metric approach [Briand et al., 2002]

ROUND ROBIN

During a stand-up, attendees need to know who is supposed to contribute next. Having a facilitator decide who goes next is a subtle though definite force against self-organisation. The team should know without intervention who goes next.

Therefore

Use a simple predetermined rule to determine who should go next. Round robin, clockwise or counter-clockwise doesn't matter, it doesn't even matter if it's consistent day-to-day. What is important that the team runs the meeting not the facilitator or manager.

FOCUS ON THE BACKLOG

Some people find it difficult to keep the project context in mind when they are contributing. Symptoms of this would be attendees leaving the stand-up without a clear awareness of what remains for the iteration and release, and not much of a direct relationship with issues raised during the stand-up and the progress of the iteration and release.

It is much easier to understand project context with a visible reminder.

Therefore

Maintain an information radiator (aka Big Visible Chart) showing the iteration and release status and hold the stand-up near it. The display serves as an obvious reminder of what remains to be done.

But

Focusing on the backlog may cause a tendency for the stand-up to focus on tasks rather than people. There are always important and subtle people issues that will not be discovered if there is too much focus on task status.

Smells

“I endured regular stand-up meetings for three years. What made the meetings most painful was my boss (I'll call him Wally). His main reason for the stand-up meeting was not to increase efficiency or embrace XP as much as it was to shorten human interaction beyond anything directly related to the work product. ... For Wally, however, the stand-up meeting (like the 7 a.m. Monday meeting and the 5 p.m. Friday meeting) was a loyalty test designed to reinforce the employer-employee relationship.” [LaPlante, 2003]

The feel of an effective stand-up is about how you know when things are going right. Smells are about how you know when things are going wrong. It is important to note that even if you have no smells, this does not mean the stand-up is going right. It just means that it doesn't “stink”.

Most of the following smells are linked back to the previous patterns. For those that are not, the underlying issues tend to be more subtle or outside the scope of the daily stand-up, and people will have to come up with their own solutions.

Socializing

One of the goals of the stand-up is to increase team socialization. However, the daily stand-up is not intended for team members to “catch up” with each other on non project-related matters. It's difficult to provide examples of this since the degree to which socializing passes from team-building to distracting varies from team to team. The threshold can be detected from the behaviours of participants not directly involved in the socialization. If their energy levels remain high, then it's probably just team-building; if their energy levels drop, then **TAKE IT OFFLINE**.

I Can't Remember

“What did I do yesterday?... I can't remember... What am I doing today?... I dunno...”

Daily stand-ups are meetings. Like all meetings, participants have a responsibility to prepare. In this case, the responsibility for all participants is to know the answers to **YESTERDAY OBSTACLES TODAY OTHER**. There can be more leniency when it comes to not knowing what will be done today since sometimes there is actually nothing specific planned except picking the next highest priority task off the stack.

Lack of preparation causes slower pace which causes lower energy. It also risks failing **FIFTEEN MINUTES OR LESS** which further reduces energy levels.

Obstacles are not Raised

There may be several reasons for obstacles not being raised. Not remembering, high pain threshold, lack of trust in raising issues (because **Obstacles are not Removed**, **Chickens Interrupt** with blaming), etc.

Obstacles are not Removed

With the exception of a blaming environment, the surest way to stop people from raising obstacles is to not remove them. Unfortunately, typically this standup smell is really an indication of a larger organisational smell. What the stand-up will hopefully do is make it very explicit to observers that obstacles to the success of the project are being raised and not being removed.

Stand-up Meeting Starts the Day... Late

Because the stand-up is seen to start the work day, no work is done before the stand-up. Depending on how late in the morning the stand-up is, this can have a significant impact on available working hours. This leads to **DON'T USE THE STAND-UP TO START THE DAY**.

Chickens Interrupt

Regular interruption by observers is very disruptive to the delivery team by challenging the premise that the daily stand-up is primarily for the delivery team (aka “pigs”). Interruption also threatens **FIFTEEN MINUTES OR LESS**. Enforce **PIGS AND CHICKENS**.

Story Telling

Instead of providing a brief description of an issue, enough to allow others to offer assistance later, the participant provides much more details and context, enough to cause others to tune out. Identify obstacles during the stand-up. Discuss the details after the stand-up. Titles not stories. **TAKE IT OFFLINE**.

Problem Solving

The key to keeping the stand-ups **FIFTEEN MINUTES OR LESS** is to limit the **Story Telling** and not succumb to **Problem Solving** during the meeting. **TAKE IT OFFLINE**.

People are Late

This is directly addressed by **START AT THE SAME TIME** but as mentioned, may indicate that the stand-up is being held at the wrong time.

Low Energy

Could indicate a slow-down of pace due to **Story Telling, Problem Solving**, etc. Could be simply a matter of team size. Could be the time of day.

Issues are Only Raised in the Stand-up

Stand-ups act as a safety net. At worst, an obstacle will be communicated to the greater team within one day. However, doing stand-ups is not intended to stop issues from being raised and resolved during the day. This tends to indicate a problem with the collaborative culture of the team.

Conclusion

Hopefully this paper has provided some more insight into the subtle details of effective stand-up practices and also common problem indicators. It should be clear that a daily stand-up is not just standing up together every day. In fact standing up is probably not the most important pattern to have.

It is important not to be too concerned about not having every pattern or even having some of the smells. If all the goals are satisfied and the “feel” is good, you’re probably okay. After all, it’s really just standing up together every day.

Related Work

As far as I know, there are no other low-level patterns papers on daily stand-ups though the core ideas exist in the referenced papers. There are a couple online articles on daily stand-up anti-patterns or smells ([Miller, 2003], [Cohn, 2003]) though both are limited in scope.

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