Retrospective Toolkit

What you will get out of this toolkit

Innovation is an iterative process with continuous learning as one of its core capabilities. We are always reflecting on how to improve our products, services or processes but the same emphasis must also be put on our ways of working together. This is why retrospectives are so important for everyone of us as they help us to innovate ourselves to be innovative.

Start doing Retros

Understand the purpose and structure of retros and start off with a sample retro

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Facilitate a Retro

Learn about the importance of a facilitator and how to successfully guide a retro.

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Design Your Own Retro

Combine different methods to fit the retro to your teams specific needs and focus.

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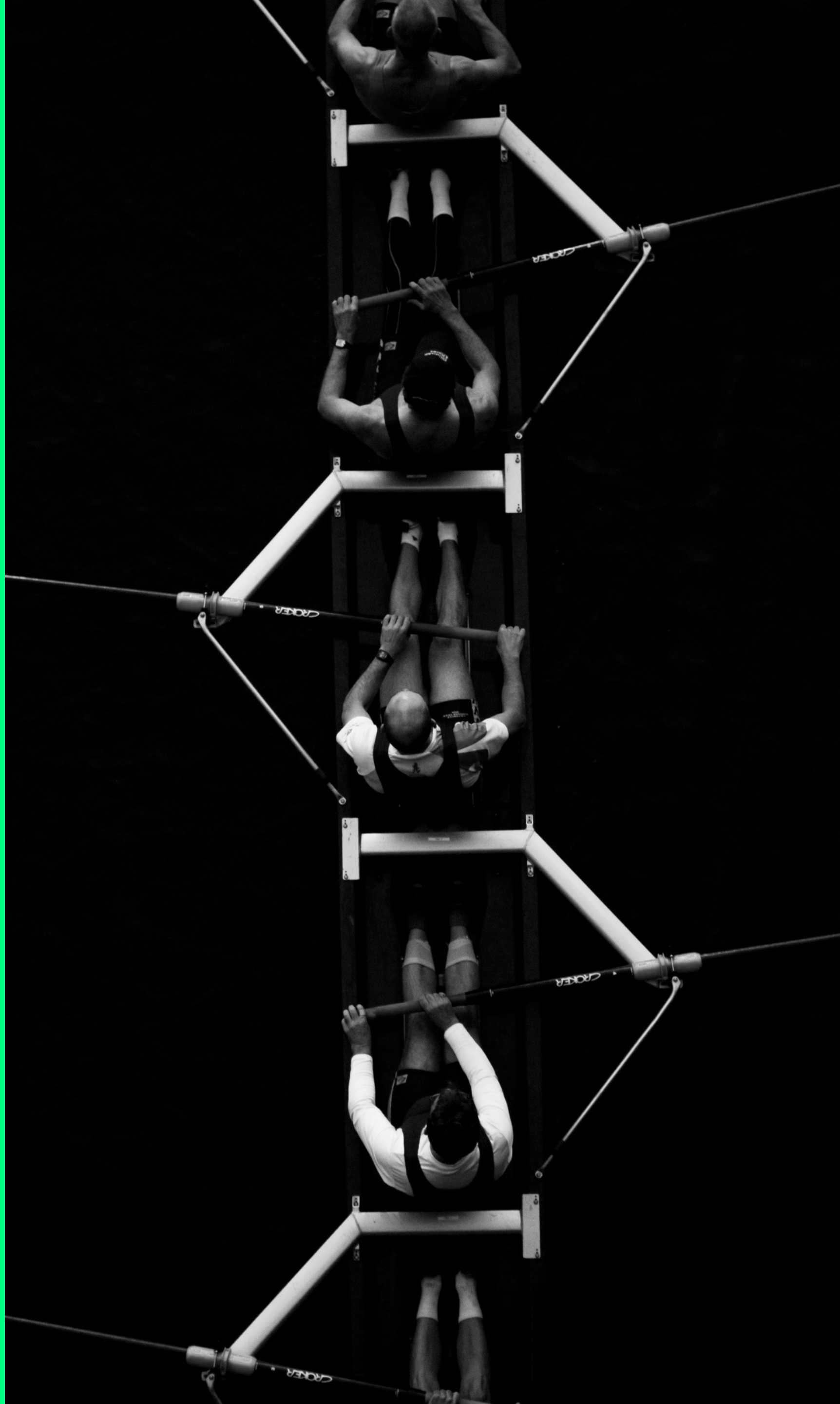
This guide is accomplished by a Miro Board with all methods for you to design your virtual retrospectives. And yes, we also have some sample retrospectives for you there.

Start doing Retros

Understand the purpose and structure of retros and start off with a sample retro



Intro to Retrospectives

PURPOSE The purpose of a retrospective (short: retro) is to create a safe space where you and your team can have an **honest conversation to look back and reflect altogether** on your projects, your collaboration with each other and your overall team culture. It provides the opportunity for everyone to share their perspectives and experiences to **identify what went well and where areas of improvement are.** It helps to openly discuss conflicts and resolve them together. By the end of a retro, you will have **determined measures to adjust and increase project effectiveness, team cohesion and individual well-being.**

STRUCTURE In order to get the most out of retros, **they need to happen regularly** to provide an constant opportunity for reflection and adjustment together as a team. Choose a rhythm that fits to your team and project set-up - **we recommend to do a team retro every 2 to 3 months.** Depending on your team size, the amount of possible topics to discuss and the time span between your retros, the **length of a team retro varies between 1 to 2 hours.**

A common team retro is structured as follows:

1 Retro Preparation

- Organize and brief a neutral facilitator
- Set up a meeting with everyone
- Have a short self-reflection as preparation

2 Retrospective

Check-in

- Get everyone onboard
- Create a safe space to share honestly

Reflection

- Look back at last experiences, align as a team and discuss arising patterns and themes

Actions

- Set goals and define appropriate actions for improvement
- Set clear responsibilities and timelines

Check-out

- Get everybody onboard for the agreed actions and the upcoming period of time

3 Retro Documentation

- Capture the results from the retro for accountability

Start off with a Sample Retro

We created some sample retro for you to start off right away with your (first) retrospective. Just copy and paste these or use them as starting point for designing your very own retrospective. Add or change any method you want, leave out methods if you are limited in time – feel free to design your own retro according to your needs.

Sample Retro 1

team size: all
length: 60-90 min*
style: more rational

*depending on team size

Methods included:
- One Word Check-in
- Quick Retrospective
- Energy Level Check-out

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Sample Retro 2

team size: all
length: 70-90 min*
style: rational & emotional

*depending on team size

Methods included:
- One Word Check-in
- Mad-Sad-Glad
- Start-Stop-Continue
- 3Ws
- Energy Level Check-out

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Sample Retro 3

team size: small to medium
length: 70-90 min*
style: more emotional

*depending on team size

Methods included:
- One Word Check-in
- Emotional Journey
- KALM
- Action Assessment
- Energy Level Check-out

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miro You can find also all Sample Retros on our Miro Board in the grey section.

Retro Rules

Dos

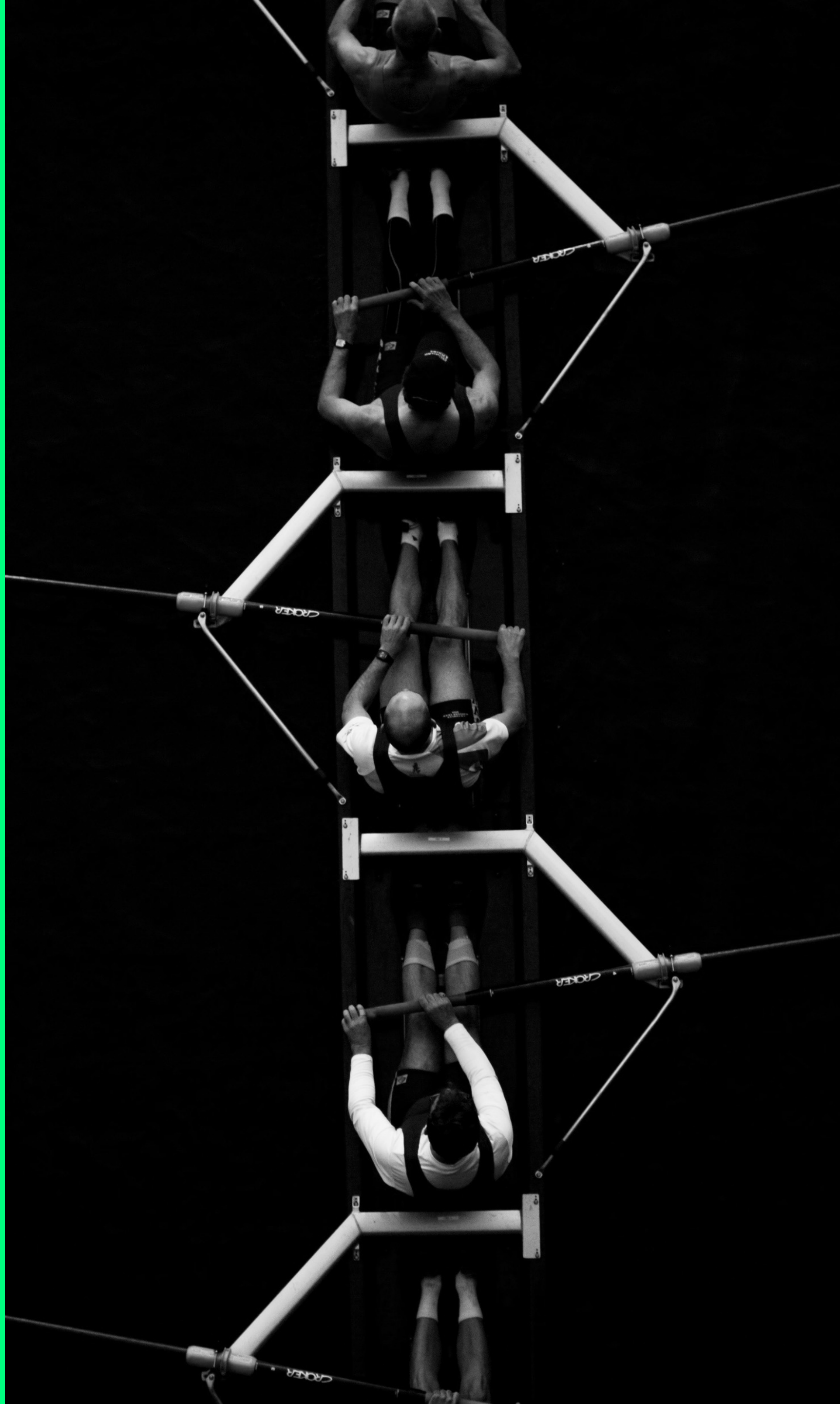
- **Have a (neutral) meeting facilitator** so every team member can concentrate on the reflection.
- **Speak up** and give everyone the opportunity to do so.
- **Be totally honest**, but constructive and respectful.
- **Criticize actions and behaviours**, not people.
- **Embrace every feedback** without instant judgement.
- **Focus on improving the future** and don't argue about the past.
- **Make it a safe space**: what happens in the retro, stays in the retro.

Don'ts

- **Use the retro as a sole complaint session** – focus on solutions and improvements.
- **Use the retro to solve (personal) conflicts** – make use of a separate clear-the-air meeting instead.
- **Have too many things you want to change at once** – prioritize and focus on the most pressing issues.
- **End the retro without commonly agreed goals, actions, responsibilities and timelines** – if time is up, define who is responsible to follow up on that.
- **Have retros irregularly** – try to schedule it in a regular manner to give the team a space to reflect and take actions for improvement together.

Facilitate a Retro

Learn about the importance of a facilitator and how to successfully guide a retro.



Retrospective Facilitation

PURPOSE Retros work best with facilitators to **guide the team through the retro**. They **make sure that the retro works seamlessly** by framing exercises, moderating discussions, connecting the dots throughout the exchanges and help the team to come to decisions. They manage to **keep an overview** while the team can dive deep into the retro and its exercises. **Ideally, this facilitator is not a team-member** to ensure neutral facilitation. This also gives every team member the opportunity to freely share their experiences and opinions without holding back due to the facilitation role.

What a facilitator does

- **Creating a safe space** for an honest exchange by giving the framing and the house rules
- **Being flexible** to adjust the agenda on the go if necessary – but having the goal and time in mind
- **Ensuring that everybody gets the chance to speak** and motivate team members to do so
- **Ensuring the focus of the discussions** on understanding how to improve in the future and acting on that
- **Explaining the purpose of every exercise** to get a mutual understanding
- **Helping the team to prioritize and decide** if they get lost and make them move on and postpone topics if necessary
- **Handle the moods** – also in case of an escalation

What a facilitator does not do

- **Taking part in discussions** – only moderate the discussions as they weren't part of the teams experiences (in case you are facilitating as a team member, make sure to tell the others when you voice your opinion as a team member)
- **Taking sides** – leave out own feelings and opinions to ensure neutrality
- **Provide solutions** – trust the team in finding solutions on their own and help them by guiding them
- **Acting superior to the team** – you also don't know what will be the outcome of this retro, so act on eye-level and guide the team

Team & Facilitator Check List

	Before Retro	During Retro	After Retro
Team	☐ Organize a neutral facilitator ☐ Brief the facilitator ☐ Set up meeting with whole team and decide if meeting is virtual or in-person ☐ Spend 15 min to individually reflect your latest experience before the retro	☐ Focus on ending with concrete actions and responsibilities	☐ Document the results of the retro for accountability ☐ Give a feedback to the facilitator
Facilitato	☐ Check with team lead or team if there are any specific topics that need to be focused on ☐ Choose retro methods and customize templates if necessary ☐ Plan retro (agenda, set up, timeboxing, methods etc.)	☐ Be a neutral facilitator – if you are a team member, always communicate from which perspective you are talking ☐ Timebox and document or appoint a team member to do so ☐ Moderate discussions and decisions efficiently for the team	☐ Check with the team if there is any additional topic arising from the retro for which they may need help of a facilitator

How to Facilitate a Retrospective

There is no right or wrong when it comes to facilitation as everyone approaches this differently. However, here are some things for you to consider when facilitating a retro:

1 Focus on the team and its needs
Choose the methods according to the team's needs and not otherwise. When preparing the retro, get in exchange with the teams to find out if there are any specific topics or focuses needed. During the retro, try to sense the teams moods and react.

2 Get to know the methods
Most templates are very much straightforward – however, if you are not familiar with them, take your time to get to know the methods. It's your job as facilitator to know the methods but also how to guide others through them and how to adapt instantly.

3 Design your own retro
There is no standard retro – enjoy the flexibility and create your own retro but with your team's needs and focuses in mind. Use the methods from this toolkit to start but feel free to explore or create new ways of reflecting.

4 Plan your retro realistically
Choose your methods and timebox all your facilitation steps thoroughly. However, always leave a time buffer in order to be able to give the team the space to exchange and discuss if needed.

5 Be aware of your different roles or delegate
As facilitator you have several roles such as moderator, notetaker, timekeeper. Try to focus on moderation and if you need help with the other roles, ask somebody from the team, e.g. to take notes for documentation.

6 Stay flexible
Retros can be very timeboxed but try to accommodate the team during the retro – if they need more time, go through your agenda and see if you can free up some time. Also, if you can sense that a method does not work, be flexible to adapt it or to provide another one.

7 Give and keep an overview
Always explain the process, methods and purposes. But also keep an overview about the discussed topics and connect the dots for the team whenever they loose the overview. They need to trust the process and you are their trusted guide through that.

8 Make documentation efficiently
The documentation of the retro starts during the retro. Take care that decisions are documented, always ask everyone to group things immediately, don't move post-its but copy them and so on.

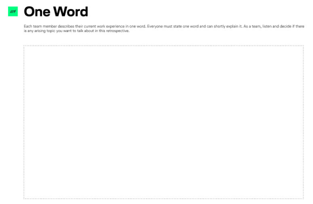
9 Find your style
There are different poles of facilitation styles – try to find yours: whether you are facilitating emotional vs. rational, active vs. passive or proactive vs. reactive. Also, adapt the facilitation of methods to your style if you like. Maybe you want to start somewhere else or add a sharing - feel free to find your very own way.

Design Your Own Retro

Combine different methods to fit the retro to your teams specific needs and focus.

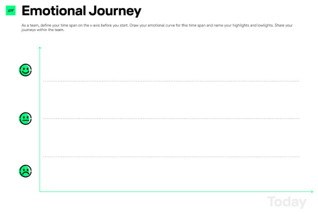
Retrospective Toolkit for team retros, sprint retros and also individual reflection.

One Word (> 5 min)
Check-in | Quick team onboarding

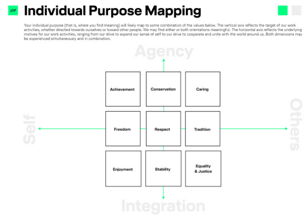


KALM (> 30 min)
Reflection | Action-focused reflection

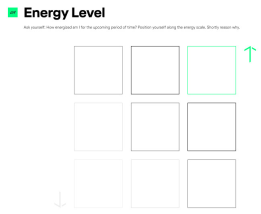
Emotional Journey (> 10 min)
Reflection | Gaining empathy for each other



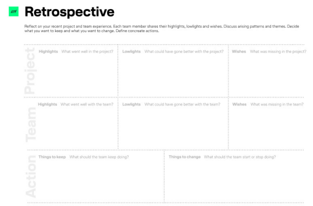
Purpose Mapping (> 20 min)
Reflection | Understanding individual purposes



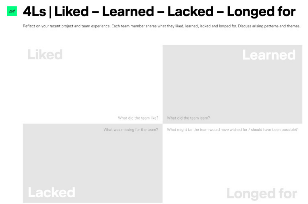
Energy Level (> 1 min)
Check-out | Capturing motivation & moods



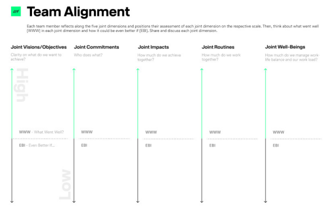
Retrospective (> 70 min)
Reflection & Action | Single method retro



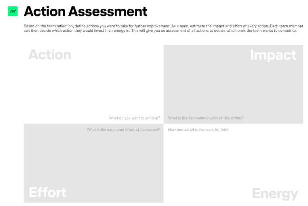
4Ls (> 30min)
Reflection | Emotion-focused reflection



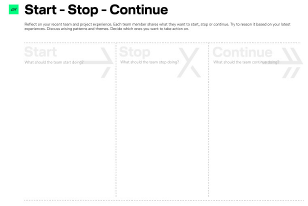
Team Alignment (> 40 min)
Reflection | Alignment on joint dimensions



Action Assessment (> 20min)
Action | Decision-making on actions

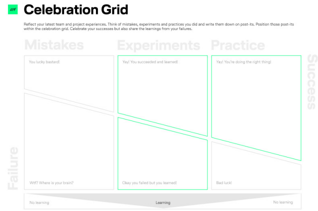


Start-Stop-Continue (> 30 min)
Reflection | Action-focused reflection

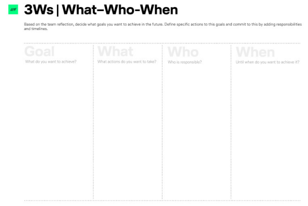


Mad-Sad-Glad (> 30 min)
Reflection | Emotion-focused reflection

Celebration Matrix (> 25 min)
Reflection | Illustrating learning successes



3Ws | What-Who-When (> 15 min)
Action | Concrete goal planning



Design your own retro

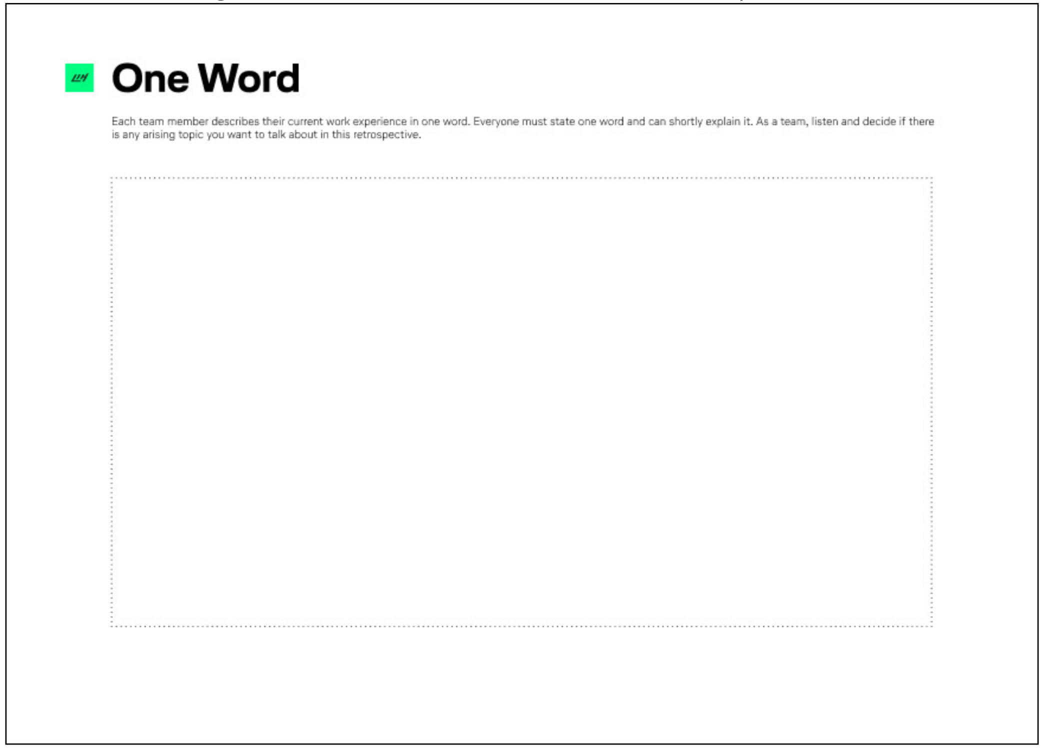
Combine different methods to fit the retro to your teams specific needs

One Word (> 5 min)

Category Check-in
Substitutes Every check-in method

Purpose

Quickly get everyone onboard for the retrospective by reflecting and deciding for one word to mirror the last period. Gain a first understanding for the other team member's experiences.



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How To Facilitate

I. **Ask the team to think of one single word** that describes their last and current work experience best and write it down on a post-it (1 min).

II. **Ask each team member to share** their word and shortly explain it (1 min per person).

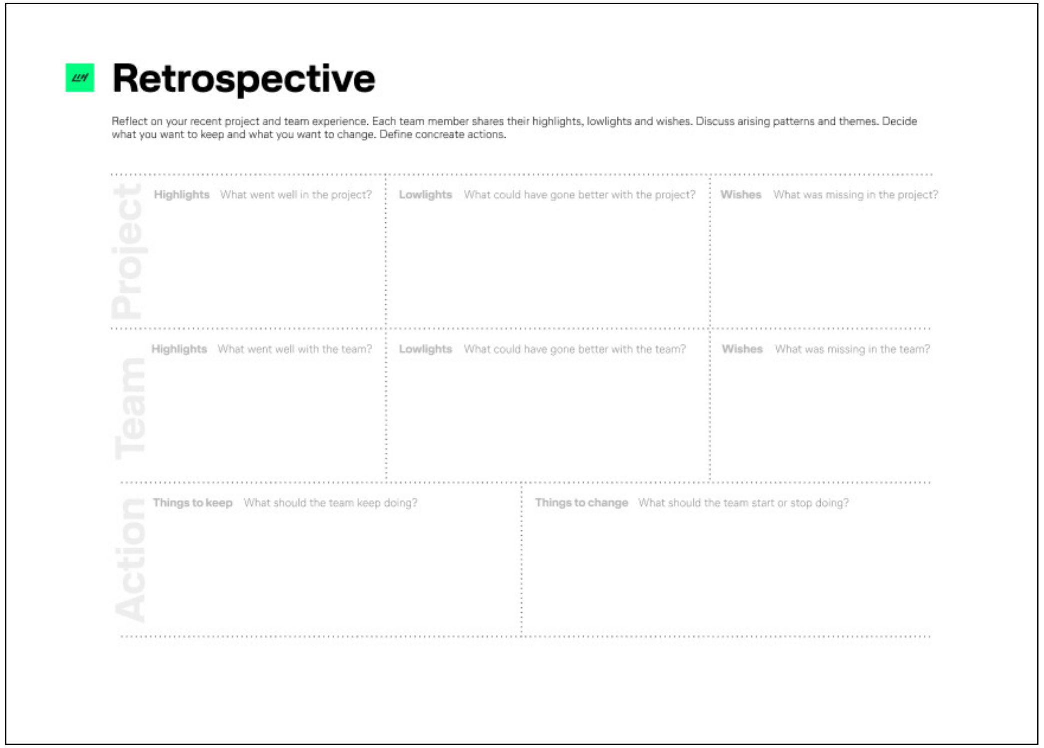
III. **Let the team decide if there is any arising topic** they want to talk about in this retrospective. Put this in the backlog and come back to it (earliest during reflection, latest during definitions of actions) (3 min).
Tip: create a backlog where you and the team can add arising topics – even if there is not enough time in the retrospective, the team can also schedule separate meetings for these topics later.

Retrospective (>70 min)

Category Reflection & Action
Substitutes Each combination of reflection-focused (e.g. 4Ls) and action-focused method (e.g. KALM)

Purpose

Simple one-template method for reflection and action-setting that comprises the retro on one single sheet.



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How To Facilitate

I. **Introduce the different categories** (project, team and actions) and their respective dimensions.

II. **Start with the project retro:** ask the team to reflect along the three dimensions (5 min, post-its), let them share and listen (1 min per person).
Tip: ask them to group similar topics while sharing.

III. **Ask the team to group for arising patterns.** Give them the opportunity to comment and discuss (10 min).
Tip: name the patterns for easy recall.

IV. **Continue the same for the team retro** (20-25 min).

V. **Continue with actions:** first, ask the team to collect **things to keep** by looking at the patterns of highlights and wishes. Make them decide which ones they want to commit to. Ask them to define concrete actions and responsibilities (15 min).
Tip: set a concrete number for easy decision, e.g. 3 things to keep with 1 action and 1 responsible person each.

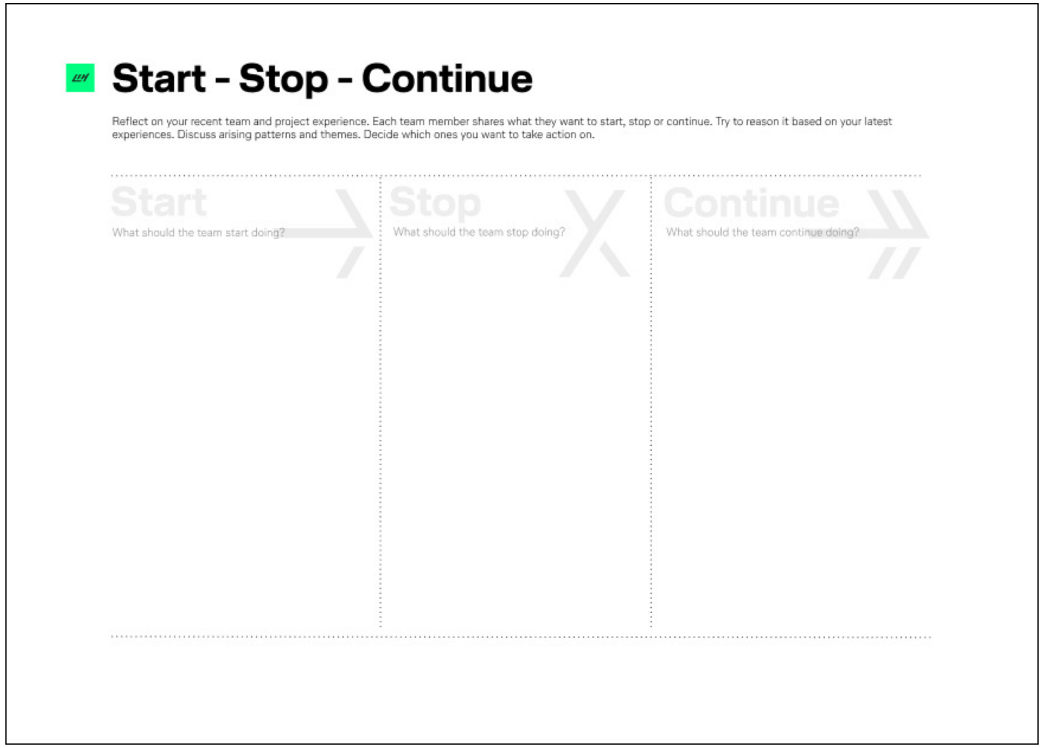
VI. **Continue the same for things to change** by looking at lowlights and wishes (15 min).

Start – Stop - Continue (>30 min)

Category Reflection
Substitutes KALM
Combinations Start with 4Ls or Mad-Sad-Glad and concentrate on actions here

Purpose

Action-based reflection that fosters thinking about what you learned from past experiences and, based on that, what you wish for for the future.



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How To Facilitate

I. **Introduce the method and ask all team members to individually reflect** on their past experiences. Based on that, they should think about their wishes along the three dimensions (5-7 min).

II. **Ask the team members to share and listen:** let every team member quickly share their three dimensions and put these on the canvas (1-2 min per person).
Tip: If similar wishes occur, ask the team members to already group them.

III. **Ask the team to group similar things** to see if there are patterns (3-5 min).
Tip: Naming arising patterns makes it easier to talk about them and remember them afterwards.

IV. **Ask the team to discuss and decide** which actions they want to commit to (10-15 min).
Tip: In case a discussion is not effective, try to use the action assessment as decision-making tool.
Note: Don't forget to define responsibilities and timelines, if applicable.

KALM | Keep – Add – Less – More (>30 min)

Category	Reflection
Substitutes	Start – Stop – Continue
Combinations	Start with 4Ls or Mad-Sad-Glad and concentrate on actions here

Purpose

Action-based reflection that fosters thinking about what you learned from past experiences and, based on that, what you wish for for the future.

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How To Facilitate

I. **Introduce the method and ask all team members to individually reflect** on their past experiences. Based on that, they should think about their wishes along the four dimensions (5-7 min).

II. **Ask the team members to share and listen:** let every team member quickly share their four dimensions and put these on the canvas (1-2 min per person).
Tip: If similar wishes occur, ask the team members to already group them.

III. **Ask the team to group similar things** to see if there are patterns (3-5 min).
Tip: Naming arising patterns makes it easier to talk about them and remember them afterwards.

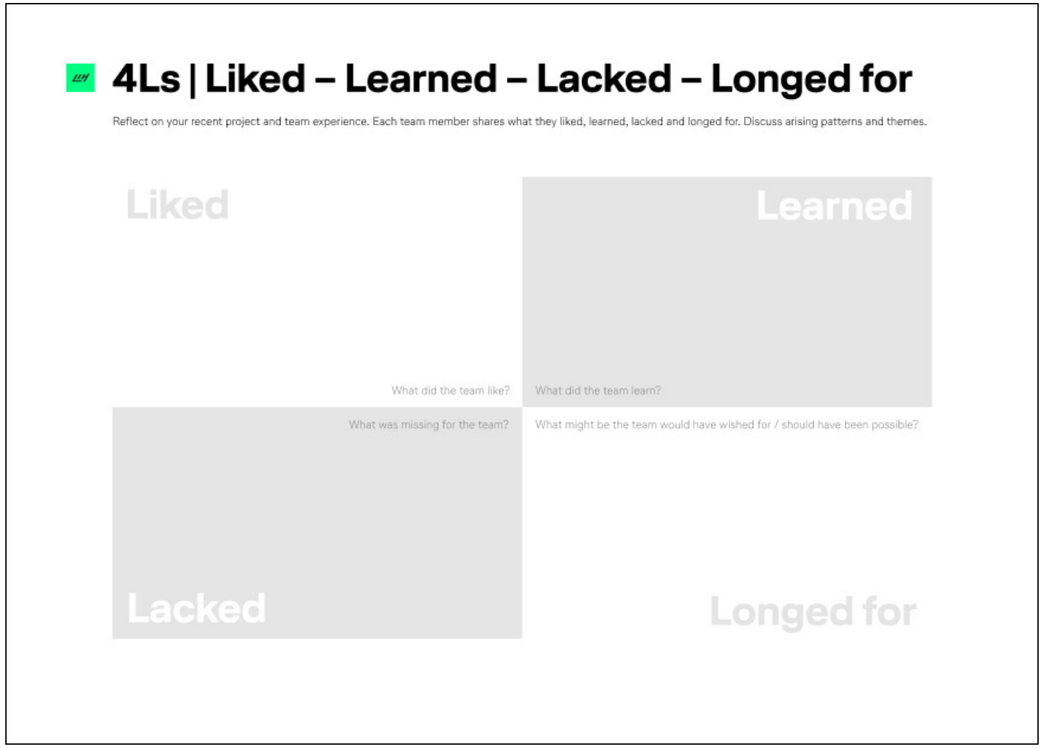
IV. **Ask the team to discuss and decide** which actions they want to commit to (10-15 min).
Tip: In case a discussion is not effective, try to use the action assessment as decision-making tool.
Note: Don't forget to define responsibilities and timelines, if applicable.

4Ls | Liked – Learned – Lacked – Longed for (>30 min)

Category Reflection
Substitutes Mad – Sad - Glad

Purpose

Emotion-focused reflection that focuses on the reflection of past experiences as base to derive actions afterwards.



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How To Facilitate

I. **Introduce the method and ask all team members to individually reflect** on their past experiences (5-7 min, post-its).

II. **Ask the team members to share and listen:** let every team member quickly share their four dimensions and put these on the canvas (2-3 min per person).
Tip: If similar experiences occur, ask the team members to already group them.

III. **Ask the team to group similar things** to see if there are patterns (3-5 min).
Tip: Naming arising patterns makes it easier to talk about them and remember them afterwards.

IV. **Ask the team to discuss what they want to focus on in the future and brainstorm actions for that** (10-15 min).
Tip: Combine it with Start-Stop-Continue or KALM to lead the discussion about actions along a framework. Start with positioning the patterns from this template into the other one and then brainstorm actions.

Mad– Sad – Glad (>30 min)

Category Reflection
Substitutes 4Ls

Purpose

Emotion-focused reflection that focuses on the reflection of past experiences as base to derive actions afterwards.

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How To Facilitate

I. **Introduce the method and ask all team members to individually reflect** on their past experiences (5 min, post-its).

II. **Ask the team members to share and listen:** let every team member quickly share their three dimensions and put these on the canvas (2-3 min per person).
Tip: If similar experiences occur, ask the team members to already group them.

III. **Ask the team to group similar things** to see if there are patterns (3-5 min).
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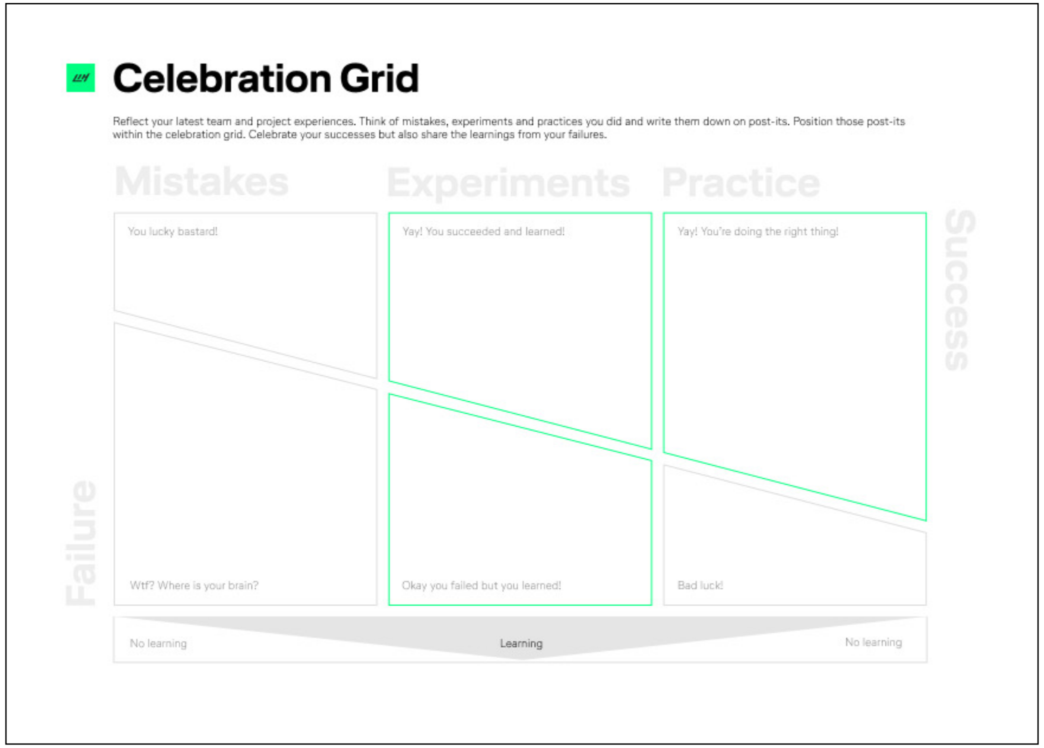
Celebration Grid (>25 min)

Category Reflection
Combinations Continue with an action-based reflection method (Start-Stop-Continue or KALM) to derive actions

Purpose

Gaining an understanding for learnings, celebration of learning successes and acknowledgment of failures.



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How To Facilitate

I. **Introduce the method** as learning reflection.
II. **Ask the team members to reflect** on experiences in the past period and document these on post-its (5-7 min, post-its).
III. **Then, ask every team member to position their experiences** on the canvas: it may be hard to position everything, but it's more important to get everything positioned somewhere on the canvas than to get it right (3 min).
IV. **Explain the different categories:** the learning areas are the green ones, the forgiving areas are the yellow ones, the avoidable area is the red one. Try to convey the notion that not everything should be celebrated as successes or failures. Instead try to celebrate learnings as not every success desirable and not every failure is bad (3-5 min).
V. **Give the team the time to rethink their positioning** and discuss their reasoning behind that (10 min).
VI. **Optional:** Use a action-based reflection method next to derive actions for the future that fosters the green are and prevents the red and yellow area.

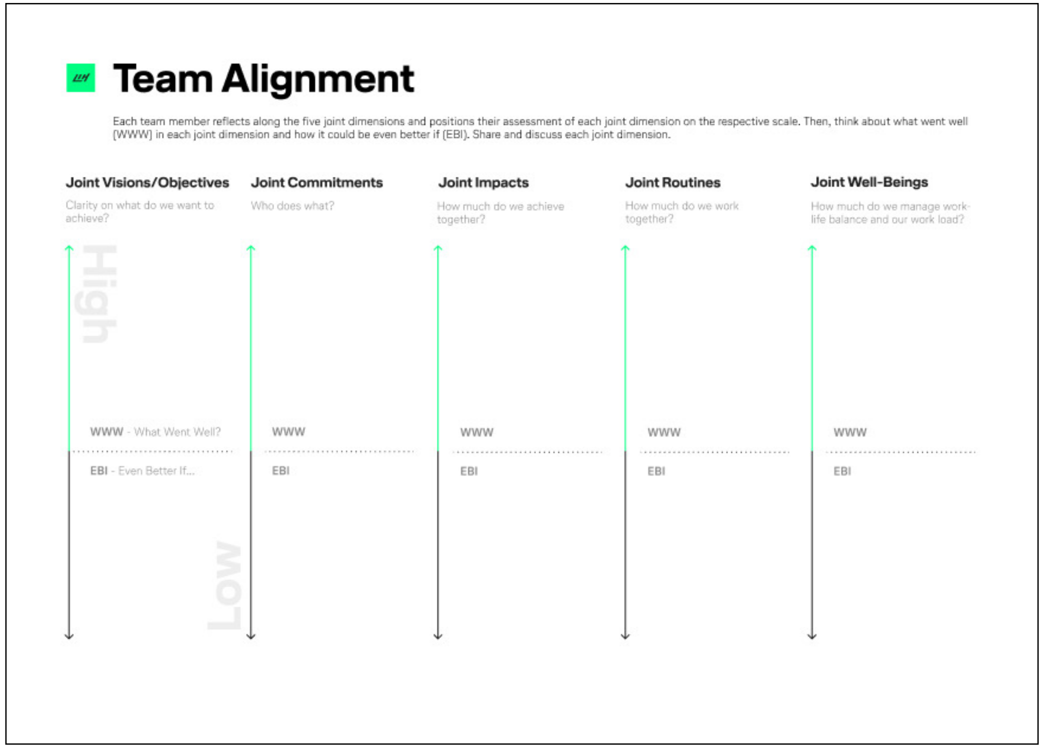
Team Alignment (>40 min)

Category Reflection

Combinations Continue with an action-based reflection method (Start-Stop-Continue or KALM) to derive actions

Purpose

Creating a common understanding through aligning all team member's perceptions across different dimensions.



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How To Facilitate

I. **Introduce the method** by introducing the 5 dimensions, the scale and the two fields of WWW and EBI.

II. **Start with the first dimension:** ask everyone to reflect on this dimension and position their perception with a dot on the scale (1 min). In case, that it is not aligned among the team, get an understanding of the different perceptions (3 min). Then, ask everyone to reflect what went well (WWW) and what could be improved (EBI) and share (5-7 min, post-its).

III. **Continue the same procedure with all other dimension** (8-10 min each).

IV. **Optional:** Use an action-based reflection method next (e.g. KALM) to derive actions for the future to improve the joint dimensions.

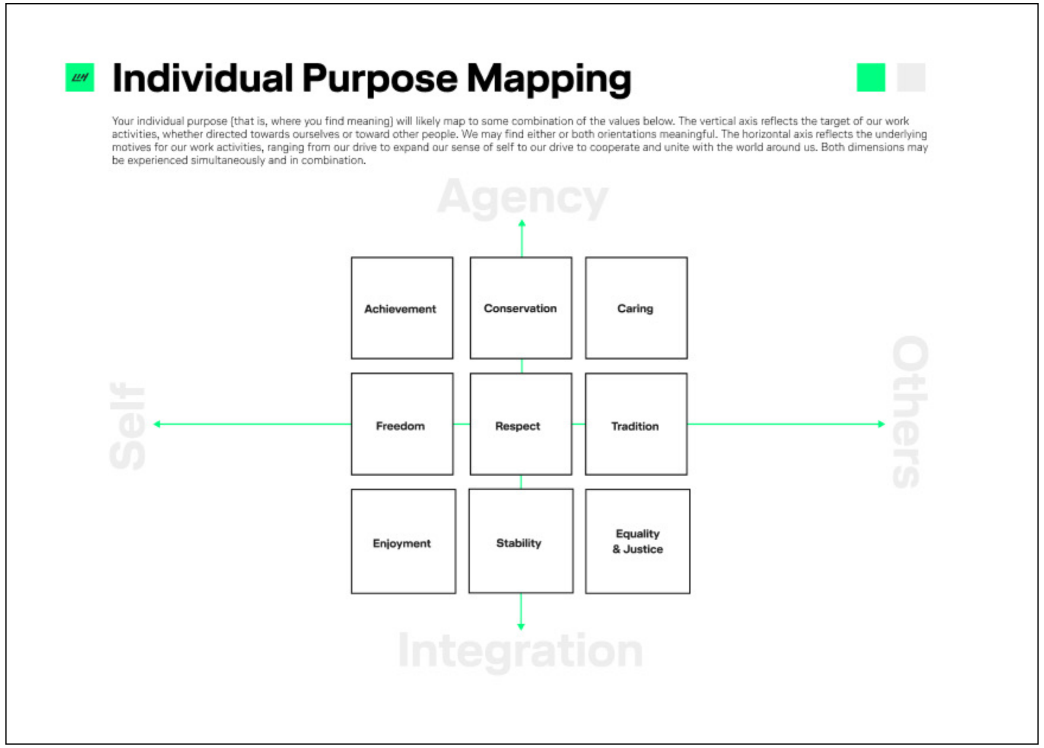
Individual Purpose Mapping (>20 min)

Category Reflection

Check-in | **Reflection** | Actions | Check-out

Purpose

Gain an understanding for each team member's individual purpose and acknowledge different drivers for motivation and ways of working within the team.



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How To Facilitate

I. **Introduce the method** by explaining the vertical and horizontal axis as well as the 9 different purposes.

II. **Ask each team member to reflect on their individual purpose:** give them a specific amount of dots (e.g. 10) and let them distribute these across the 9 different purposes to define the different dimensions of their individual purpose (5-7 min).
Tip: This can be done on one canvas but the facilitator could also prepare one canvas for every single person beforehand.

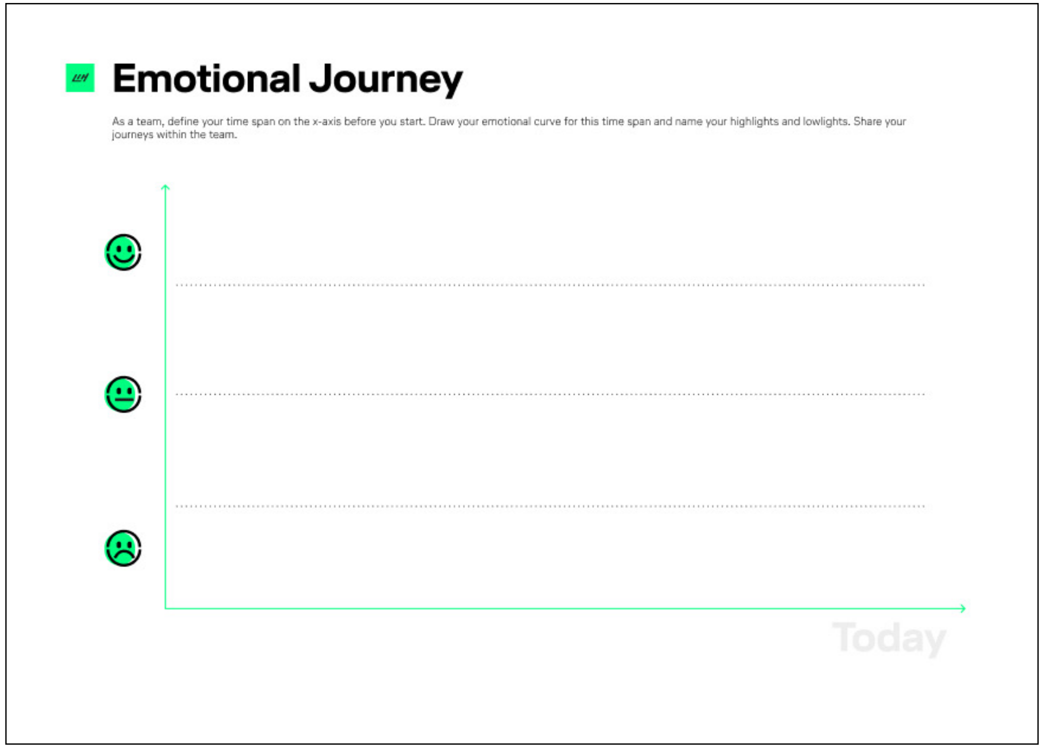
III. **Then, ask each team members to share** their map and explain their reasonings (2 min per person)
OR
ask all team members to map their dots on one main canvas to see the variety within the team. Ask team members if they want to share their purposes. (8-10 min)

Emotional Journey (>10 min)

Category Reflection

Purpose

Gaining an understanding and empathy for every individual team member's mood journey during the last period of time.



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How To Facilitate

I. **Introduce the different method.**

II. **Ask the team to decide for a time span to be considered** by adding a starting point and, if available, specific events or milestones (2 min).

III. **Give every team member the opportunity to reflect, draw their emotional journey and name highlights and lowlights** (5 min).
Tip: This can be done on one canvas but the facilitator could also prepare one canvas for every single person beforehand.

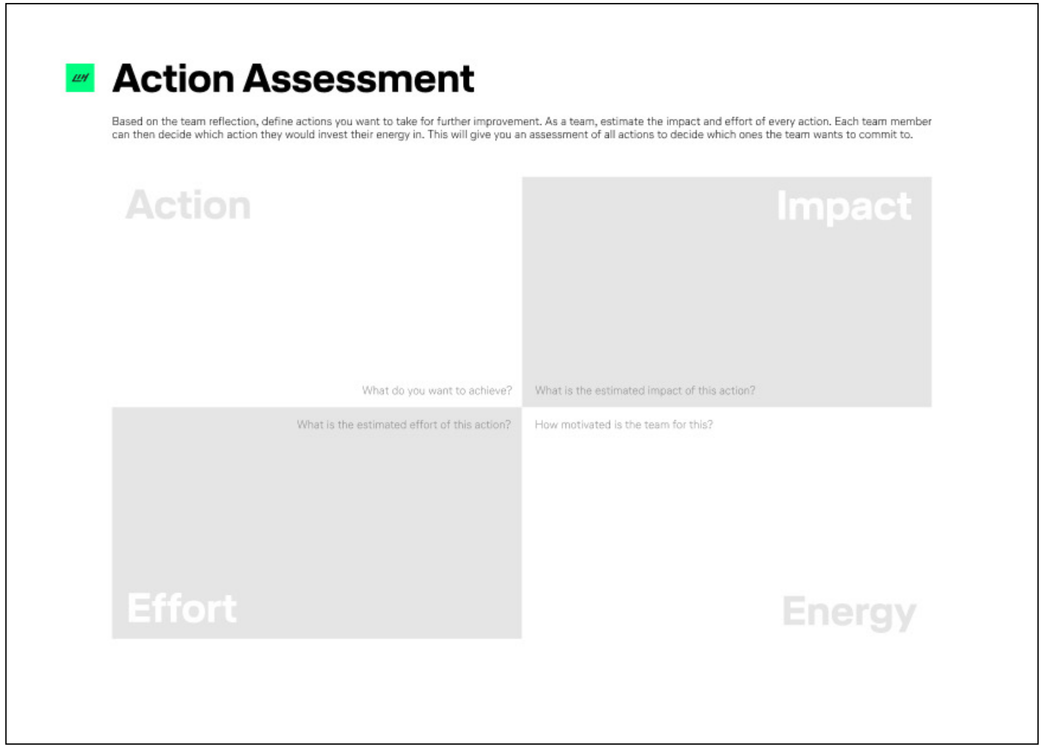
IV. **Ask the team to share and just listen** (1 min per person).
Tip: Especially when team members are sharing vulnerable moments, try to show appreciation to their openness, e.g. by thanking them for sharing it with everyone.

Action Assessment (>20 min)

Category Reflection

Purpose

Deciding which actions to commit to by assessing their respective impact, effort and motivation of the team.



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How To Facilitate

I. **Introduce the method** as decision tool for actions.

II. **Start with collecting actions:** collect all the already brainstormed actions from the reflection to this canvas and position them under each other (2 min).
Note: If you don't have actions yet but goals, collect these and brainstorm actions first.

III. **Let the team estimate impact and effort by discussion:** provide them a scale of low – medium – high (or similar) and ask them to collectively decide for an estimate (3-5 min per action).
Tip: This assessment doesn't need to be an in-deep analysis but just a rough analysis. If they fail to decide, give them a last minute until they need to move on.

IV. **Let the team state their energy level for the actions:** after the assessment of all actions, give each team member a limited amount of dots and let them decide on what actions they want to put their energy in by distributing the dots (2 min).

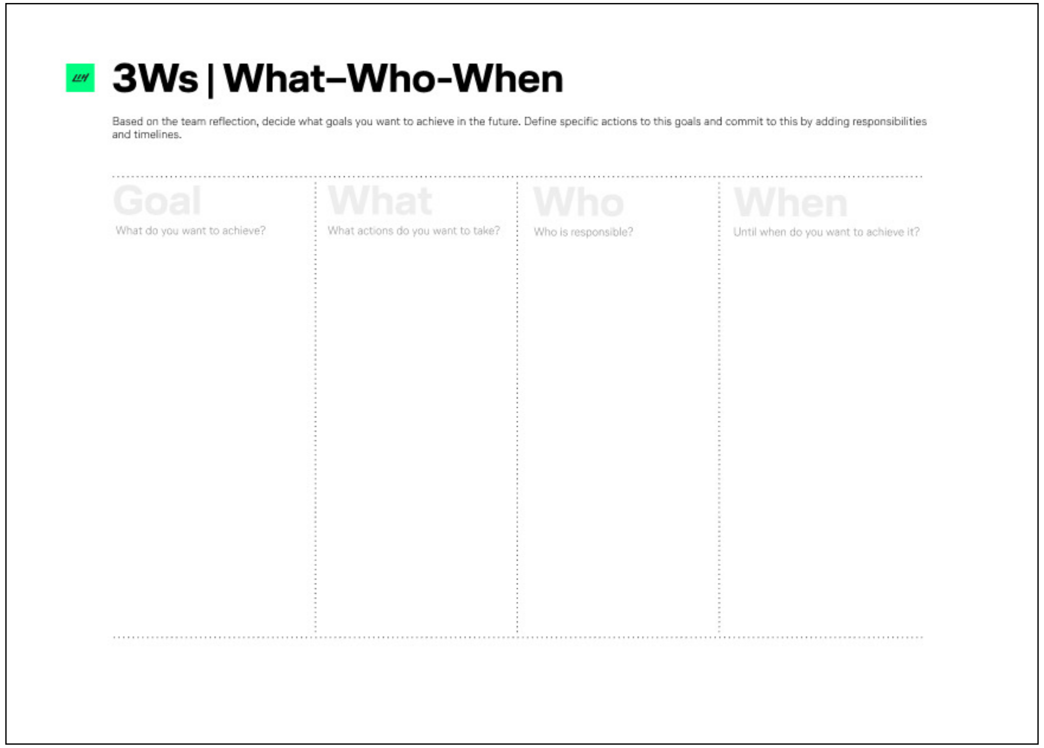
V. **Let the team decide which 3 actions they want to commit** to based on the assessment. (3 min)

3Ws | What – Who – When (>15 min)

Category Reflection
Substitutes Other external methods

Purpose

Getting concrete on goals by defining actions and agreeing on responsibilities and timelines to ensure accountability.



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How To Facilitate

I. **Introduce the method** with it's dimensions to define.

II. **Start with the collecting the goals and then ideate concreate actions:** if the goals are already defined in previous reflection, then just collect all goals on and position each goal under each other (so that one line summarizes the goal, its actions, responsible person and deadline). Brainstorm concreate actions. (10 mins).
Note: Sometimes, actions are collected in the reflection phase rather than goals. In that case, collect all actions, group similar ones, choose most important patterns and formulate the respective goal.

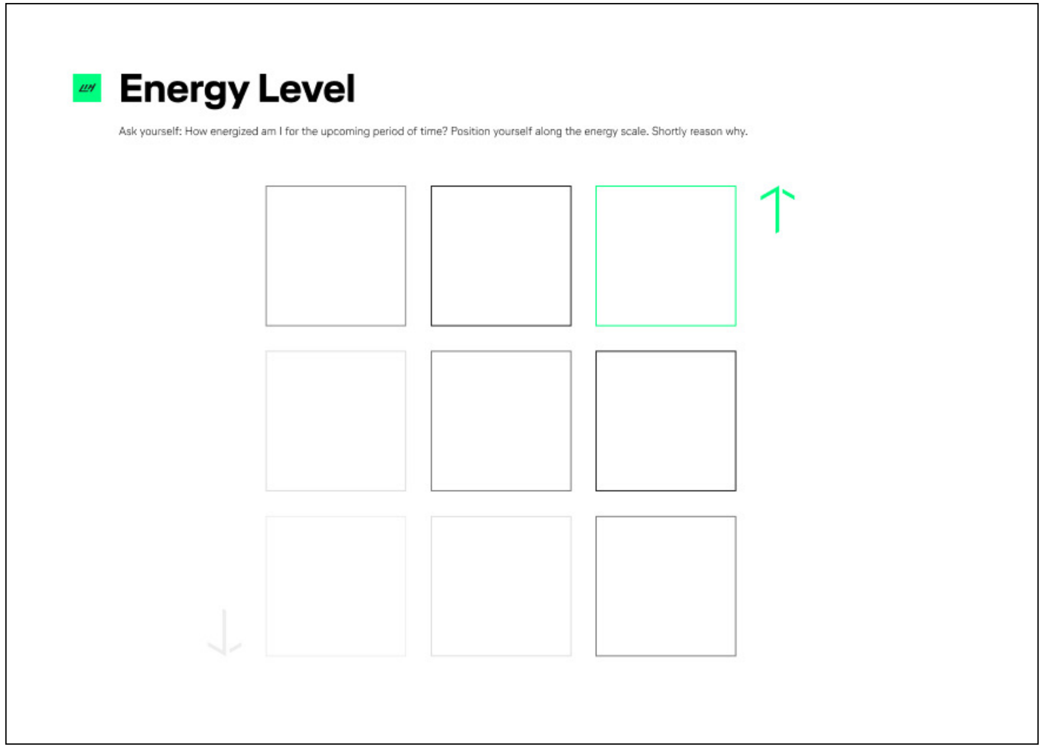
III. **Ask the whole team to discuss who is responsible and what the timeline/deadline for each goal is** (5-10 mins).
Tip: In case time is running out or they can't decide, they should at least decide a responsible person, who is in charge to figure this out afterwards.

Energy Level (>1 min)

Category Check-out
Substitutes Every check-out method

Purpose

Quickly get everyone's motivation for the goals and actions resulting from the retro as ending mood board.



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How To Facilitate

I. **Introduce the method** with the leading question "How energized do you feel for the upcoming period of time?".

II. **Ask all team members to position themselves** along the different battery levels as levels of motivation for the upcoming period of time where the actions and goals from the retro will be implemented (1 min, post-its/dots).

III. **Ask team members to share why they feel like this (optional)** (1 min per person).
Tip: In case anybody is at the lower end, take the time for sharing to get a better understanding why but try to end on a good note by asking the team member with highest level of motivation to share last.