



# Project Management for Legal Professionals: The Agile/Scrum Method

# The Agile/Scrum Method

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**Author's Note:** In this quick guide, I have explained the Scrum framework using conversational language to make it more accessible and easier to understand. Please note that while efforts have been made to simplify the concepts, it is essential to refer to official Scrum documentation and resources for a complete and accurate understanding of the framework. The intent of this guide is to provide a general overview and introduction to Scrum, but it is not a substitute for comprehensive training or guidance from certified Scrum professionals.

## Introduction

Have you ever come across the coffee mug or meme that says being a lawyer is easy? It humorously compares the experience to riding a bike that's on fire while you're also on fire, and everything around you is ablaze. I couldn't help but reflect on that as I prepared this presentation. It made me realize that work-life doesn't have to be that chaotic. We can find a better way where work doesn't feel like a raging inferno.



Agile project management has been revolutionizing the business world for nearly two decades, with Scrum currently dominating the landscape. If you're new to project management, Agile, or Scrum, there's no need to worry. Despite its perceived mystique, Scrum is actually quite straightforward. It's a framework that can significantly enhance the effectiveness and efficiency of managing legal matters. Over the past decade, I have been immersed in various project management methodologies, striving to find the most

suitable approach for legal business settings. However, for the past several years, I have been actively practicing and coaching Agile, particularly Scrum, and I am thrilled to share this knowledge with all of you. I hope you can take these insights back to your workplace and render that coffee mug obsolete.

## Agile Umbrella

Project management encompasses a range of methods that can be employed to

effectively manage projects. These diverse styles of project management are commonly referred to as methodologies or frameworks by project managers. In our previous session, Session 1, we delved into the world of Predictive/Waterfall project management. Now, in Session 2, our focus shifts to the realm of Agile and Scrum methodologies.

## **What is Agile Project Management?**

Agile and agility bring to mind the image of a remarkably flexible gymnast. The term "agility" finds its roots in the Latin word "agere," meaning "to drive or act." It conveys a sense of ownership and the ability to propel things forward. Other definitions highlight the "ready ability to move with quick easy grace." These attributes of adaptability, rapid change response, speed, and accuracy are precisely the qualities experts have sought to incorporate into project management.

Agile businesses swiftly and effectively respond to both opportunities and risks in the dynamic business environment. Agile can also be described as having a quick, resourceful, and adaptable character. In the context of project management in today's business world, agility encompasses three essential characteristics:

1. Sense of ownership and authority
2. Quick and easy changes in direction
3. Resourcefulness and adaptability

When we apply these attributes, which we have defined as "agility," to the practice of project management, we arrive at Agile project management. To ensure clarity, I use the term "traditional project management" to refer to methodologies like Waterfall, which we discussed in Session 1. Traditional Project Management has proven effective for projects with well-defined solutions, clear scope, and estimable time and cost factors.

However, in the realm of legal work, there are often significant unknowns and uncertainties, such as cases of first impression or novel legal matters. As you may have experienced, clients sometimes realize their actual needs only after engaging in a legal matter. The consequences of unsatisfactory project completion can be substantial, particularly when schedules are missed, and budgets overrun. Attorneys face challenges when clients struggle to comprehend why they owe a substantial sum while the recently requested work remains unfinished. Agile project management is an approach that acknowledges the reality of continuous change, incorporating discovery

and learning throughout the project lifecycle.

By embracing Agile project management, legal professionals can effectively navigate uncertainties, adapt to evolving client needs, and deliver satisfactory outcomes. This approach allows for continuous adjustments and improvements, ensuring that legal projects stay on track and meet clients' evolving expectations. Agile project management acknowledges the inherent complexities of legal work and provides a framework for managing change and delivering value throughout the project.

In the subsequent sessions, we will delve further into the Agile methodology and specifically explore the Scrum framework. We will uncover how Scrum can be applied to legal project management, equipping you with practical tools and techniques to enhance project success. Let us embark on this Agile journey together, unlocking the potential for improved project management in the legal field.

## Agile Principles

At its core, Agile is a set of values and principles initially developed by a team of software developers in 2001. These 12 principles aim to guide companies in prioritizing important aspects such as customer satisfaction, collaboration, adaptability to change, and more. While originating from the software development field, these principles can be effectively applied to various industries, including the legal sector, with a touch of imagination. The following 12 Principles are based on the [Agile Manifesto](#).

Agile Principles
1. Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
2. Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.
3. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.
4. Business people and developers must work together daily throughout the project.
5. Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.

6. The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.
7. Working software is the primary measure of progress.
8. Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.
9. Continuous attention to technical excellence and good design enhances agility.
10. Simplicity—the art of maximizing the amount of work not done—is essential.
11. The best architectures, requirements, and designs emerge from self-organizing teams.
12. At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.

**Agile Values**

In addition to the 12 principles, The Agile Manifesto also comprises four Agile values. These values, along with the principles, form the foundation of Agile methodology. Let's delve into each Agile value to gain a better understanding.

Agile Values	
Individuals and interactions over process and tools	This means Agile places more importance on people than process and even tools. People respond to business needs and drive the development process. Processes and tools are static. they're only as adaptable and flexible as their creator. By their very nature processes and tools are less responsive to change and can be unable to meet client needs.
Working products over comprehensive documentation	This means documentation takes up time. While documentation is important, particularly in the legal field, excessive documentation can result in delays. Agile is about streamlining, not eliminating documentation. A good analogy would be courts of appeal. They typically limit the length of legal briefs because they know there is a critical

	<p>mass of information where anything additional is just superfluous. So, while documentation has its value, in the Agile mindset, it's the overall work product that is paramount.</p>
<p>Customer collaboration over contract negotiation</p>	<p>This means clients and legal teams must work out the details of delivering work product, but rather than negotiate this process, Agile champions collaboration with clients. Negotiation is “I win, you lose” or “I win bigger than you win.” Collaboration is “win, win.” Also, negotiation usually involves suspicion and separate agendas. Collaboration requires trust and shared goals.</p>
<p>Responding to changes over following a plan</p>	<p>This is probably the most contentious statement. Traditional project management methodologies have always tried to control the amount of change within a project. Since you have sequential steps - one that has to be completed right after the other - and you have to create a plan for the entire project all at once, change management procedures are designed to keep change within a project to a bare minimum. This has often led to technically "successfully" completed projects but sometimes with none of the presently desired outcomes. Agile project management turns this approach to change management upside down. On Agile projects, the ability to not only respond to but welcome change is important. The ability to embrace change is built into every Agile process, practice and attitude. For example, while scrum has a rule of "no change within the sprint", you are free to add, remove, reprioritize or even chuck away the whole product backlog if the product owner allows it. In essence, this means that scrum accommodates any degree of change in between sprints.</p>

Within the Agile philosophy, Scrum serves as a key framework. It aligns with the vision of the Agile Manifesto by facilitating efficient work organization, promoting collaboration, reducing redundancies, eliminating unnecessary steps, and providing frequent opportunities to assess and adapt our work in response to changes.



## Agile Triangle

You saw in Session 1 that traditional project management fixes the scope but allows time and cost to vary to some degree — this is how we ended up with a lot of upfront requirements. Agilists invert the triangle so that time and cost are fixed, and scope is allowed to vary instead. The Agile Triangle, also known as the Iron Triangle or Project Management Triangle, represents the relationship between three fundamental constraints in a project: scope, time, and cost. In the traditional waterfall approach, the constraints are typically represented in a triangle shape, with scope at the base and time and cost forming the two sides. However, in the context of agile project management, the triangle is often depicted as inverted, with time, cost, and scope in a different order.

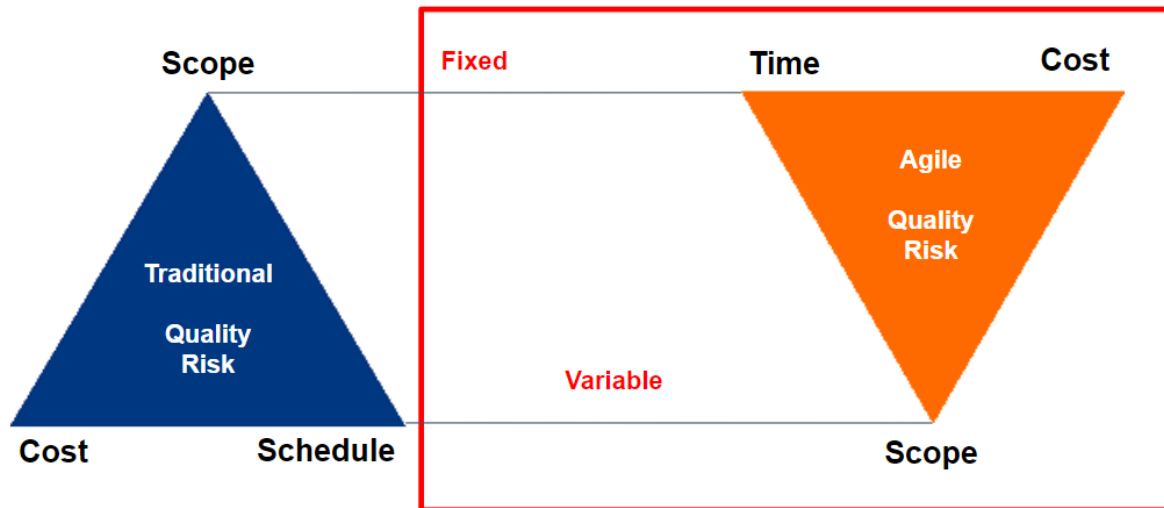
The inversion of the triangle in agile project management signifies a different approach to project planning and execution. Here's the rationale behind the inversion:

**Customer value and flexibility:** Agile methodologies prioritize delivering customer value by focusing on iterative and incremental development. The emphasis is on delivering working and valuable increments of the product as early as possible. Therefore, scope becomes more flexible and adaptable to changing customer needs or market demands. Customer value takes precedence over a rigid scope.

**Fixed time and cost:** Agile projects typically work within fixed timeframes and budgets. The project team commits to fixed iterations or sprints with predetermined durations, and the cost is controlled within the allocated budget. By keeping time and cost relatively constant, agile teams can make better decisions about the scope to fit within those constraints.

**Continuous planning and adaptation:** Agile methodologies encourage continuous planning and adaptation throughout the project lifecycle. As the project progresses, new information and insights emerge, which may influence the scope and priorities. Agile teams regularly reassess and reprioritize the work based on customer feedback, market conditions, and changing requirements. This flexibility allows the team to maximize customer value within the given time and cost boundaries.

## Iron Triangle vs. Agile Triangle



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You'll see why this inversion is important as we discuss the Scrum method and its project life cycle.

## The Scrum Framework

### Definition

Language is constantly evolving, and as we use and adapt words, their definitions change to reflect their meaning in the present context. Similarly, the term "scrum" we are referring to is derived from the word "scrummage," borrowed from the game of rugby. In rugby, a scrum, or scrum for short, is a method used to restart play after a foul. It involves eight players from each team tightly packed together, with heads down, all striving to gain possession of the ball. This analogy can be applied imaginatively to project teams. The Agile Project Management movement emerged from the need to adapt dynamically to changing circumstances that teams encounter, and this is where the rugby team analogy comes into play. In rugby, the objective is to advance the ball down the field, one possession at a time. Likewise, projects can adopt a similar approach by shifting focus from solely winning the overall game to achieving success in each milestone and deliverable. Therefore, "scrum" simply implies running projects in a manner akin to a rugby match, pursuing smaller goals and deliverables that ultimately lead to project completion.



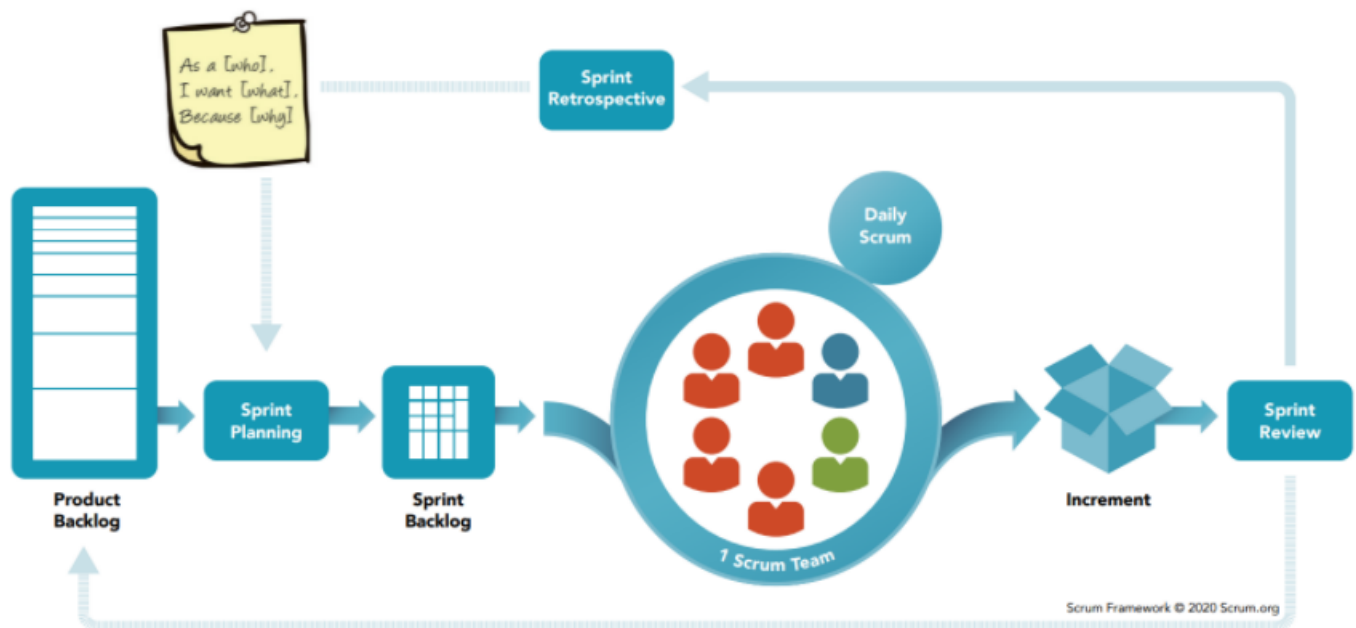
## Agile vs. Scrum

The terms Agile and Scrum are often used interchangeably, but it's important to note that they are distinct concepts. Agile serves as a comprehensive label encompassing a specific philosophy, mindset, and value system, offering a unique approach to project work. Its primary objective is to embrace the uncertainties in the environment and leverage that knowledge to devise strategies that enable rapid and effective responses. Within the Agile umbrella, there are several project frameworks, including Extreme Programming, Disciplined Agile Delivery, and Scrum, which are widely utilized.

To better understand the relationship, consider Agile as the foundational belief system that underpins various project frameworks. Each framework has its own set of practices while sharing the underlying Agile principles. Among these frameworks, Scrum stands out as the most commonly employed. If you haven't yet encountered Scrum, chances are you will in the future. To prepare you for that, let's take a holistic view of the Scrum framework, and later we'll delve into its specific components and workings.

## Scrum - The Big Picture

So here's the big picture of the Scrum framework.



Although it may seem complex at first glance, Scrum is actually quite straightforward. Let's begin with the basics. All project work is carried out by individuals possessing key skills. Recognizing this, Scrum has established three essential roles that every Scrum team should have. These roles are the Product Owner, the Scrum Master, and the Development Team. Let's delve into each role.

First, we have the Product Owner, or PO for short, who serves as the business representative within the team. Their primary responsibility is to define the work that needs to be accomplished. The PO acts as the liaison between the business stakeholders or clients and the team. They determine the priority of requested work items for the team and ensure that they focus on the most crucial tasks first. In a legal context, the PO can be likened to the supervising attorney assigned to a particular case or matter.

The next role is that of the Scrum Master. This individual is tasked with ensuring that the team adheres to the Scrum framework and operates as efficiently and effectively as possible. They also take on the responsibility of identifying and resolving any impediments or blockers that may hinder the team's progress. In a legal setting, the Scrum Master role could be fulfilled by a paralegal or an attorney.

Last, we have the Development Team, which is the third key role. What sets Scrum teams apart is their cross-functional nature. This means that each team member utilizes their skills to complete any task required for the project. The team collectively commits to accomplishing the work. It's important to note that neither the Product Owner nor the Scrum Master micromanages the Development Team. The team operates as a self-managing entity and collaboratively determines the best approach to completing the work. Sometimes the term "Scrum Team" is used to refer to all three roles collectively. We'll delve into more detail shortly, so if you missed any information, there's no need to worry.

Essentially, Scrum is a lightweight framework comprising values, principles, and practices. It offers several key promises:

1. Fast feedback
2. Continuous improvement
3. Rapid adaptation to change
4. Accelerated delivery

Fundamentally, Scrum operates by breaking down substantial products or services into smaller, manageable pieces that can be completed within short

timeframes.

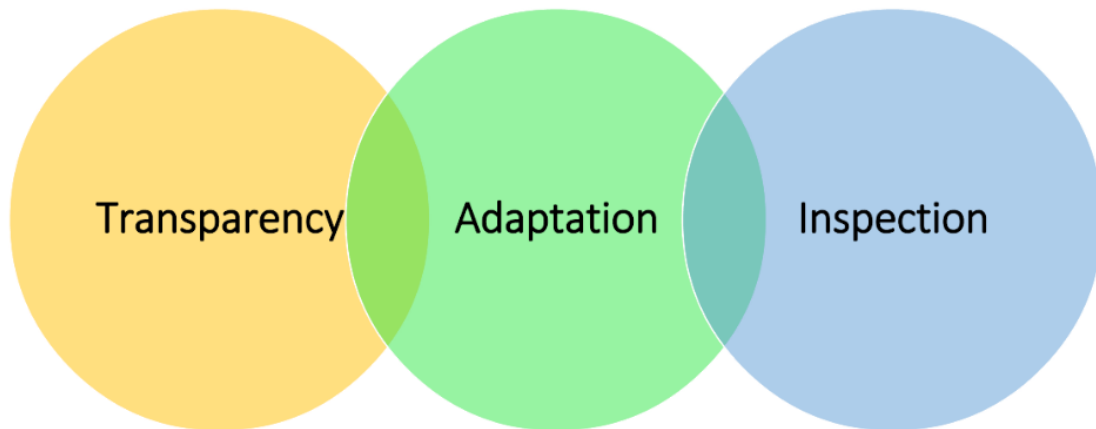
## Scrum Benefits

Scrum offers numerous benefits, and I will highlight five of them:

1. **Gain a clear understanding of the bigger picture:** By breaking down complex projects into manageable tasks, Scrum prompts you to think about the specific actions required to achieve a goal. It fosters reviewing and revising these actions collaboratively with your team, keeping the ultimate goal in mind while focusing on the necessary steps to reach it.
2. **Foster team transparency without micromanagement:** Scrum encourages transparency, allowing team members to be aware of each other's progress. However, it avoids micromanagement, providing autonomy for individuals to complete their work in their preferred manner. In a Scrum team, there is no traditional "boss," although Product Owners are ultimately responsible for the finished product.
3. **Establish clear deliverables and deadlines:** Scrum emphasizes holding oneself accountable to specific deadlines and deliverables. Instead of vague goals, Scrum promotes breaking down work into actionable tasks with defined timelines. For example, tasks during each Sprint may include conducting legal research on a specific topic and reviewing it with the client by a certain date. This approach ensures clarity for both the team and clients regarding expectations and deadlines.
4. **Enhance organization and communication:** Effective project management thrives on organization, communication, and tracking progress. Scrum places significant emphasis on these aspects, enabling open communication channels within the team and facilitating the tracking of tasks and progress. Whether utilizing Scrum or any other framework, staying organized and maintaining effective communication are vital for project success.
5. **Balance flexibility and focus:** While Scrum may seem rule-oriented, it is essential to remember that it is an Agile framework designed to deliver superior products efficiently. Scrum allows flexibility within its structure, accounting for unforeseen circumstances and enabling adaptability. It also encourages

prioritization, empowering teams to say "no" to low-impact requests. A dedicated Scrum Master or a similar team member plays a crucial role in identifying and addressing impediments, ensuring that the team remains focused and on track toward achieving its goals.

## Scrum Theory & Three Pillars of Empiricism



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The next topic is Scrum Theory, which is crucial for understanding the foundational concepts of Scrum. It is based on the experiential learning circle, which emphasizes the process of planning, doing, reviewing, and adapting to gain knowledge and understanding. Scrum Theory revolves around three pillars of empirical thinking: Transparency, Inspection, and Adaptation.

1. **Transparency** involves presenting facts as they are. All individuals involved, including clients, CEOs, attorneys, paralegals, and individual contributors, maintain transparency in their daily interactions. Trust is established among everyone, and they have the courage to share both good and bad news. They collaborate collectively towards the common organizational objective without any hidden agendas.
2. **Inspection**, in this context, refers to evaluation conducted by the entire Scrum Team, rather than an external inspector or auditor. This inspection covers various aspects such as the product, processes, people, practices, and continuous improvements. For instance, the team openly showcases the product to the client at the end of each Sprint, seeking valuable feedback. If the client changes requirements during inspection, the team embraces the opportunity to collaborate

and clarify the needs instead of complaining.

3. **Adaptation**, in this context, emphasizes continuous improvement based on the insights gained from inspection. Regularly asking the question, "Are we better off than yesterday?" is crucial for everyone in the organization. For profit-oriented organizations, the value is represented in terms of profit. The adaptation process should ultimately contribute to the goals of Agile adoption, such as increased efficiency, improved client and employee satisfaction, and profitability in flat fee matters.

These pillars of empiricism enable Scrum to adopt an iterative and incremental approach to address budget, scope, and time constraints for project completion.

### **Scrum Artifacts<sup>1</sup>**

Before we explore the Scrum Artifacts, let's provide some context. In Scrum, the Product Owner holds the responsibility for the success of the Product (i.e., work product). In a legal setting, the Product Owner is typically the attorney assigned to the case. They are responsible for creating, managing, and owning the Product vision. This vision articulates the purpose of the Product, its intended outcomes, and the value it aims to deliver to customers (clients). A clear and inspiring Product vision motivates and aligns the Scrum Team, the client, and other stakeholders, while also guiding the Product Owner's prioritization decisions throughout the project.

As we have discussed, Scrum is a project framework that values transparency and feedback. To support these principles, Scrum defines three artifacts that are open for review by anyone involved. While the term "artifact" may sound archaic, it simply refers to objects made by humans in the context of archeology. In Scrum, these artifacts are essential items used to facilitate the process.

The three primary Scrum Artifacts are: the Product Backlog, the Sprint Backlog, and the Product Increment. The Product Backlog and Sprint Backlog outline the work that needs to be completed to add value, while the Product Increment represents the portion of the product that is considered "Done" at the end of a Sprint. All three artifacts share the common objectives of maximizing transparency and fostering a shared understanding of the work at hand.

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<sup>1</sup> Scrum Artifacts maps to Rule of Professional Conduct 1.1 Competence.

## ***Scrum Artifact: Product Backlog<sup>2</sup>***

The first artifact in Scrum is the Product Backlog, which is managed by the Product Owner. It serves as the single source of work for the development team. The Product Backlog is essentially an ordered list that prioritizes all the potential work items for the project (e.g., case or matter). The top items represent the highest-priority tasks that are crucial or strongly desired, while those at the bottom may be mentioned by the client but are less likely to be implemented. For instance, the client may express the idea of filing a cross-claim against Acme Inc., even if they are not fully committed to it. In such cases, the item is added to the backlog.

To provide examples from other industries, think of an airport's backlog as all the flights awaiting departure, or a road system's backlog as the cars that need to reach their destinations. Similarly, a software development team's backlog consists of all the software features that need to be developed.

As work progresses, items in the backlog are continually refined through a process called backlog grooming or backlog refinement. This involves adding, removing, reordering, and evolving the items as needed. Redundant or unnecessary items are gradually removed. The end result is a well-maintained backlog that represents the things the team wants, should, and needs to do, without unnecessary clutter.

Before moving on to the next artifact, let's briefly discuss user stories. Although user stories are not explicitly mentioned in the Scrum Guide, they are commonly used by Scrum Teams. In Agile, putting people first is essential, and user stories place end users or clients at the center of the conversation.

The purpose of a user story is to articulate how a specific piece of work will deliver value to the client. User stories are concise sentences written in simple language, outlining the desired outcome without going into excessive detail. They typically follow a structure like: "As a [who], I want [what], so that [why]." For example, in an estate planning matter, a user story might be: "As Alicia, I want an irrevocable living trust to provide asset protection and avoid probate for my beneficiaries." Each user story represents a specific need or requirement, and they can be further broken down into smaller user stories as necessary. While this structure is not mandatory, it is helpful in capturing both the work product and its value to the client, ensuring a comprehensive

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<sup>2</sup> Scrum Artifact: Product Backlog maps to Rule of Professional Conduct 1.2 Scope of Representation



understanding of client needs. Once the user stories are clearly understood by the entire team, they can be moved to the Sprint Backlog for implementation.

### ***Scrum Artifact: Sprint Backlog<sup>3</sup>***

Now, let's discuss the next artifact - the Sprint Backlog. The Sprint Backlog is a subset of the Product Backlog. During sprint planning, which typically occurs at the beginning of a sprint (usually 2-4 weeks long), the team creates a list of items that they need to complete during that specific sprint. This list is known as the Sprint Backlog.

To clarify, the Product Backlog encompasses all the tasks that need to be done for the entire project (e.g., case or matter), while the Sprint Backlog is focused solely on the tasks to be accomplished during the current sprint. In essence, the Sprint Backlog serves as a plan outlining how the team will achieve the Sprint Goal and complete the related Product Backlog items within the current sprint. Throughout the sprint, the Sprint Backlog is continuously updated as the Development Team progresses with their work. It provides a transparent, real-time representation of all the tasks and their status within the ongoing sprint.

### ***Scrum Artifact: Increment***

Last, we have the final Scrum artifact, which is the Increment. The Increment refers to the work product that is completed at the end of each sprint. It encompasses all the tasks that have been finished not only in the current sprint but also in previous sprints.

The Product Increment serves as a reliable and transparent representation of the product's state at the conclusion of each sprint. In order to be considered complete, the Product Increment must align with the team's definition of done. Once it meets this criteria, it becomes available for inspection by stakeholders, including the Product Owner and other relevant parties such as clients. The Product Increment allows stakeholders to assess the progress and make informed decisions based on the current state of the product.

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<sup>3</sup> Scrum Artifact: Sprint Backlog maps to Rule of Professional Conduct 1.3 Diligence.

**Definition of Done.** Let's discuss the concept of the "Definition of Done." While you might assume that everyone agrees on what it means for something to be considered done, that is not always the case. In Scrum, the Development Team strives to deliver a new Increment, which is the completed work product, during each sprint. The Product Owner may choose to release the Increment immediately after its completion. In the legal field, this could involve executing and disseminating a contract to all relevant parties, or filing a motion with necessary exhibits and serving it on the appropriate parties.

An Increment is deemed "Done" when it requires no further work. To determine when work on a Product Backlog item or an Increment is complete, the Scrum Team establishes a shared definition of "Done."

Have you ever encountered confusion in your workplace regarding whether a task is truly completed? For instance, perhaps you filed a document but it was not served, or you served a document but failed to file the required affidavit or certificate of service. Or maybe you filed everything, but no hearing was scheduled, leaving the motion sitting idle. This highlights the significance of having a clear definition of done. It allows the team to establish when a backlog item is considered done, ensuring that no critical steps are overlooked. Only when the definition of done is met can a backlog item transition into an Increment.

#### **Time & Cost Estimates.<sup>4</sup>**

I would like to discuss the importance of estimating and suggest a standardized approach to estimating the time required for tasks. When planning and prioritizing backlog items, it is crucial to determine the time allocated for each item. Without these estimates, it becomes challenging to determine how many backlog items can be accommodated within a sprint. Therefore, when creating the main product backlog, it is advisable to assign a time estimate to each product backlog item (PBI).

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<sup>4</sup> Time & Cost Estimates map to Rule of Professional Conduct 1.5 Fees.

Accurately calculating the exact duration of a task can be difficult. To simplify the process, I recommend using a uniform approach to estimate task time. In my experience working with attorneys, I typically allocate one hour, two hours, half a day, or a full day for each product backlog item or task. This method provides a consistent framework for estimating the time required for tasks.

For instance, tasks that can be completed in less than a day are estimated as 1 hour, 2 hours, 4 hours, or 8 hours. All tasks fall into one of these time categories, and there are no 3-hour estimates. A task that would take 3 hours would be categorized as a 4-hour task. Larger tasks are estimated as 2 days, 3 days, 5 days, or 10 days, with all estimates falling into the next larger category if they fall in between. While extremely large tasks may be estimated in months, it is generally necessary to break them down into smaller tasks to obtain accurate estimates. This approach not only allows for more accurate estimates of legal fees, particularly under alternative fee agreements, but also reduces the risk of underestimating fees and losing revenue.

It is worth noting that there are other methods of estimation. However, considering the level of Agile maturity in most legal firms, I believe this standardized approach is the most suitable for legal matters. In other non-legal organizations, you may encounter discussions about story points, which involve arbitrary and relative estimations. Although story points are beyond the scope of our current discussion, I wanted to mention them in case you are familiar with Scrum and its practices. Explaining story points could take considerable time, so for our purposes, I will stick to time estimates since they align with the traditional approach used in the legal field.

## **Scrum Team**

The fundamental unit of Scrum is a small team of people called a Scrum Team. The Scrum Team consists of one Scrum Master, one Product Owner, and Developers called the Development Team. Within a Scrum Team, there are no sub-teams or hierarchies. It's a cohesive unit of professionals focused on one objective at a time. Effective Scrum Teams are cross-functional, meaning they have all the skills necessary to create value for each Sprint. They're also self-managing, meaning after the Product Owner assigns a backlog, they internally decide who does what, when, and how.

Additionally, the Scrum Team is small enough to remain nimble and large enough to complete significant work within a Sprint. In general, smaller teams from 3-9 members communicate better and are more productive.

The Scrum Team is also responsible for all product-related activities from

stakeholder collaboration, research, and anything else that might be required. They use Sprints to improve focus and consistency. And, the entire Scrum Team is accountable for creating a valuable, useful Increment (or work product) every Sprint.

### **Scrum Team: Product Owner**

The product owner is a role on the Scrum team responsible for managing the product backlog in order to achieve the desired outcome that a product development team is commissioned to accomplish. As I stated previously, I typically see this role as being filled by the attorney since they're responsible for the final work-product.

The Product Owner is accountable for effective Product Backlog management, which includes:

1. Developing and explicitly communicating the Product Goal
2. Creating and clearly communicating Product Backlog items
3. Ordering Product Backlog items; and
4. Ensuring that the Product Backlog is transparent, visible and understood.

The Product Owner may do the above work or may delegate the responsibility to someone else. But, regardless, the Product Owner remains accountable. I should tell you that the Product Owner is one person, not a committee although he or she may represent the needs of many stakeholders in the Product Backlog including clients.

Also, the product backlog cannot be changed without the product owner's agreement. So, for example, if you work in mergers and acquisitions and you think an additional audit needs to be conducted to ensure due diligence, that potential backlog item should be taken up with the Product Owner first.

In order to ensure the product owner is successful the product owner must be:

1. Accountable for what the product delivered
2. Authorized to make decisions
3. Adaptable to learnings and opportunities
4. Available to collaborate with the team

### **Scrum Team: ScrumMaster**

The ScrumMaster is responsible for ensuring that Scrum is understood and used appropriately by the Scrum Team. Scrum Masters do this by acting as a guide to the organization on Scrum theory, practices, and rules. The ScrumMaster is often described

as a “Servant Leader” role. This description means that the ScrumMaster leads by helping, rather than coercing. It can also be viewed as a role that serves through modeling. But the ScrumMaster is not a secretary or a gopher. The ScrumMaster is there to ensure that the Product Owner, Development Team, and organization as a whole understand how Scrum can be used to help them accomplish and align their goals.

The Scrum Master is accountable for establishing Scrum as defined in the Scrum Guide. They do this by helping everyone understand Scrum theory and practice, both within the Scrum Team and the organization. The Scrum Master is accountable for the Scrum Team’s effectiveness. They do this by enabling the Scrum Team to improve its practices, within the Scrum framework. Scrum Masters are true leaders who serve the Scrum Team and the larger organization.

The Scrum Master serves the Development Team in several ways, including:

1. Coaching the team members in self-management and cross-functionality;
2. Helping the Scrum Team focus on creating high-value Increments (or work product) that meet the Definition of Done;
3. Causing the removal of impediments to the Scrum Team’s progress; and,
4. Ensuring that all Scrum events take place and are positive, productive, and kept within the timebox.

The Scrum Master serves the Product Owner in several ways, including:

1. Helping find techniques for effective Product Goal definition and Product Backlog management;
2. Helping the Scrum Team understand the need for clear and concise Product Backlog items;
3. Helping establish empirical product planning for a complex environment; and,
4. Facilitating stakeholder collaboration as requested or needed.

The Scrum Master serves the organization in several ways, including:

1. Leading, training, and coaching the organization in its Scrum adoption;
2. Planning and advising Scrum implementations within the organization;
3. Helping employees and stakeholders understand and enact an empirical approach for complex work; and,
4. Removing barriers between stakeholders and Scrum Teams.

## **Scrum Team: Development Team**

Developers are the people in the Scrum Team that are committed to creating any aspect of a usable Increment (again work product) each Sprint. they're the people doing the work. they're creators or developers if you will. The specific skills needed by the Developers are often broad and will vary with the domain of work. However, the Developers are always accountable for:

1. Creating a plan for the Sprint, the Sprint Backlog;
2. Instilling quality by adhering to a Definition of Done;
3. Adapting their plan each day toward the Sprint Goal; and,
4. Holding each other accountable as professionals.

For the Development Team to be successful, they need autonomy and enough space to breathe to do the work they've been assigned. They'll need clarity of goals. They'll need to understand any limitations or constraints and to understand the needs of any stakeholders. They'll need support. Sometimes difficult decisions have to be made in real-time with limited information. In that case, the attorney or product owner needs to back up the decision of the development team to the client or organization if necessary. Finally, the development team needs a purpose. We frequently joke that lawyers and paralegals are problem solvers and that's true of the development team. They solve problems, they find opportunities to do well.

## **Scrum Events**

Perhaps the most important element to Scrum and Agile is the enthusiasm for communication, openness and transparency. These factors underpin everything we do in our daily work using Agile and Scrum practices; they're why we value customer collaboration over contract negotiations and why we're not afraid to respond to change as we know that feedback is important.

Agile asks that we learn from our mistakes and identify new ways to improve. As one of the principles of the Agile Manifesto states:

“At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.”

It's with this call for open communication that Scrum encourages us to hold five key events during a Sprint, all intended to help us work efficiently and closely



together, as well as to improve our knowledge and become more effective in the future.

These five events are:

1. The Sprint
2. Sprint Planning
3. Daily Scrum
4. Sprint Review
5. Sprint Retrospective

All are crucially important in their own right and it's for that reason I will briefly examine each one here.

### ***Scrum Events: The Sprint<sup>5</sup>***

The Sprint is the heartbeat of Scrum. It can be viewed as a container for all of Scrum's inspect and adapt loops. The Scrum Team delivers a new iteration of the working product every Sprint. Each Sprint lasts - at most - one calendar month, and shorter Sprints are extremely common. You'll want to figure out what works for your organization.

**Sprint Planning.** Sprint Planning is the event that kick-starts each Sprint and is where the Product Owner and Developers discuss which Product Backlog Items (PBI's) will be included in Sprint. While the Product Owner has the right to prioritize each PBI for potential inclusion in the Sprint, the Developers are encouraged to respond, raise issues and push back where necessary. The Developers then forecast how many PBI's they can deliver in the Sprint, given their knowledge of velocity, resources, and any factors which could influence the time and resources they have available. The outcome of the Sprint Planning event is to get a Sprint Goal and Sprint Backlog that everyone agrees is realistic and achievable.

The Scrum Master's role is primarily to facilitate the meeting. The Product Owner describes the objective of the sprint and also answers questions from the development team about execution and acceptance criteria/criteria of satisfaction. The development team has the final say in how much of the high-priority work it can accomplish during the sprint.

Sprint planning involves the entire Scrum team: the development team, Product

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<sup>5</sup> Scrum Events: The Sprint maps to Rule of Professional Conduct 3.2 Expediting Litigation.

Owner, and Scrum Master.

Sprint planning is limited to a maximum of eight hours. The general rule of thumb is to allow two hours of sprint planning for every one week of sprint length. That means teams should timebox sprint planning to four hours for a two-week sprint and eight hours for a one-month sprint.

### ***Scrum Events: Daily Scrum***

Now, let's discuss the Daily Scrum meeting. I want to emphasize its importance and encourage you to try implementing it as the first step when you return to the office. Among all the events in Scrum, the Daily Scrum is the only one that occurs every day during the sprint, while the others happen once per sprint cycle.

The Daily Scrum is a brief gathering of the development team that takes place for 15 minutes or less each day of the sprint. Its purpose is to inspect the progress made towards the sprint goal. For simplicity, it is recommended to hold the meeting at the same time and place throughout the sprint, as stated in the Scrum Guide.

In the previous 2017 version of the Scrum Guide, the meeting was guided by three questions:

1. What did you do yesterday to move towards the sprint goal?
2. What will you do today to move towards the sprint goal?
3. Do you see any impediments that are keeping you from reaching the sprint goal?

While these questions were effective, they were considered too prescriptive, leading to a revision in the 2020 Scrum Guide. The updated guide states that the purpose of the Daily Scrum is to inspect progress towards the sprint goal and adjust the sprint backlog as necessary. There are various ways to achieve this purpose. However, if you are new to Scrum, starting with the "yesterday, today, and what's in my way" questions is a good approach. Just remember that the discussion should not be limited to these three questions if you have other ways to make the meeting more meaningful.

It's important to note that the Daily Scrum should not exceed the 15-minute timebox. The 15-minute duration is a fundamental aspect of the Scrum framework. While you can finish earlier, the meeting should not take more than 15 minutes. You should be able to cover all the necessary topics within this time constraint.

Sometimes, the Daily Scrum may bring up conversations that require more time

than the 15-minute meeting allows. In the 2017 guide, these conversations were referred to as a "parking lot" and would take place immediately after the Daily Scrum. However, the 2020 Scrum Guide allows the Scrum Team to decide when these discussions occur. Nevertheless, any side conversations that don't involve the entire team should take place after the Daily Scrum. It's important to ensure that one or two individuals don't dominate the entire meeting with issues that are only relevant to them, leaving the rest of the team waiting to start their work.

The development team is the mandatory participant in the Daily Scrum, while the presence of the Scrum Master is typically optional. The Product Owner should attend, but it is not a requirement. Although standing up during the meeting is not compulsory, many teams find it useful to keep the event concise and focused, preventing people from getting too comfortable or distracted.

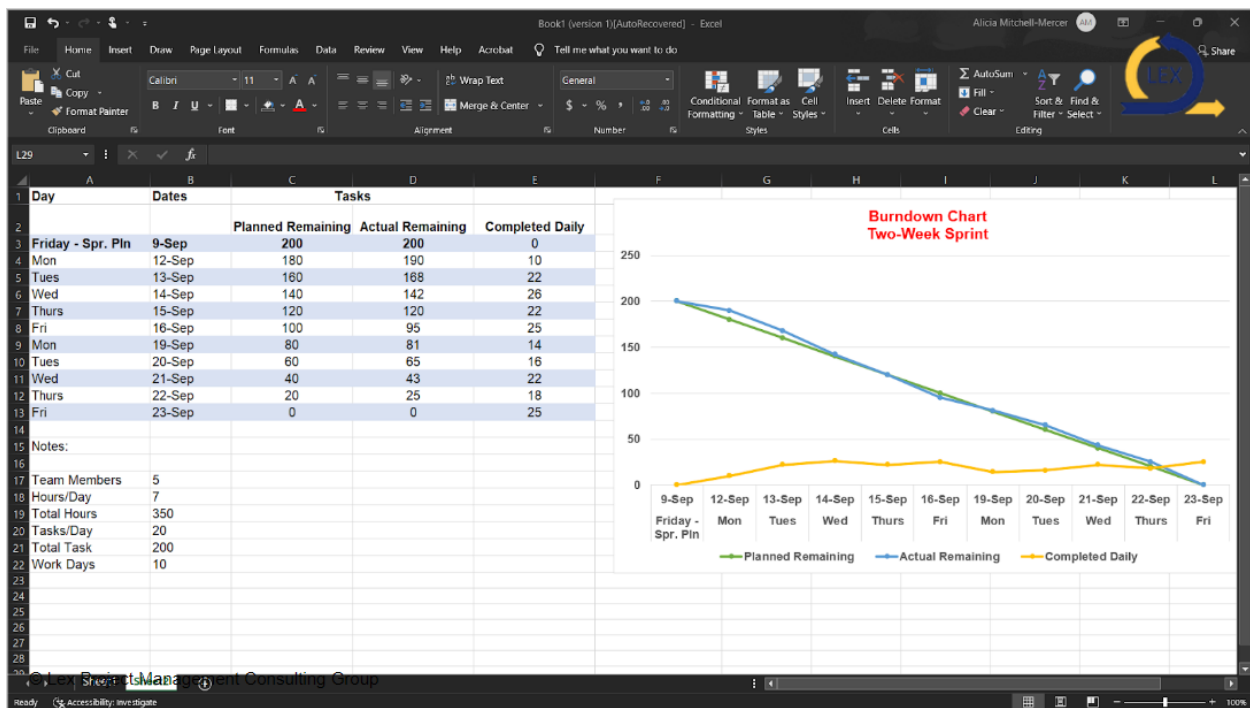
It's crucial to remember that the Daily Scrum is not a status conference. Instead, it provides an opportunity for developers to check in, assess progress towards the sprint goal, and review and plan their activities for the next 24 hours. The focus should be on efficient time and resource utilization, aligning with Scrum's principles.

### ***Productivity Tool: Burn-Down Chart.***

Now, let's discuss the Burndown Chart. Although it is not an official artifact or event mentioned in the Scrum Guide, many Scrum teams find it useful and commonly employ it. It is arguably one of the best visual tools to track the progress of your project. A Burndown Chart provides a day-by-day representation of the amount of work remaining in a given sprint. The y-axis represents the total time estimates for all the tasks planned for the sprint, while the x-axis represents the number of days in the sprint. As the sprint progresses, the amount of work remaining might fluctuate daily, but ideally, the slope of the chart should trend towards zero as the end of the sprint approaches.

The Burndown Chart allows you to track the historical information and quickly assess if the team is on track by observing the slope of the graph or the burndown velocity, which represents the average rate of productivity each day. For instance, if the team's total productivity on a typical day is 30 hours of legal work, this information can be used to estimate the completion date of the sprint. The beauty of the Burndown Chart lies in the ability to compare the actual velocity with what the team needs to do in order to finish on time. This information is crucial for assessing the status of your legal project. The Burndown Chart provides empirical evidence of whether the work will be completed on time or if there will be delays by the end of the sprint.

During the sprint planning process, time estimates were assigned to each client story to estimate the total amount of work required to complete the sprint. As team members, such as attorneys and paralegals, make progress on the client stories, they simply update the remaining time for each task they are working on. This process continues day by day, with the goal of reducing the total remaining time for the group of client stories that make up the sprint until it reaches zero at the end of the sprint. The Burndown Chart aggregates this remaining work data and presents it visually. It is a brilliant tool because it effectively communicates a wealth of information within a few seconds, making it valuable for quantifying progress during the Daily Scrum meeting.



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## **Scrum Events: Sprint Review<sup>6</sup>**

Next, we'll learn all about the Sprint Review meeting. Thinking about the principle from the Agile Manifesto — “At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.” That principle alone summarizes the reason behind our next two events, the Sprint Review and the Sprint Retrospective.

A Sprint Review usually takes place on the last day of the Sprint and allows the Scrum Team the opportunity to show the Done Increment to stakeholders (clients and anyone else considered relevant and interested). As well as inspecting the Increment, you are also after useful feedback that can help guide the work for future sprints. So, if something could have been done better, now is a good time to discuss it.

The entire Scrum team attends the sprint review. Scrum teams should also invite as many stakeholders as possible because diverse feedback is essential for creating excellent work-products.

And for practical purposes, Sprint reviews are limited to a maximum of four hours. The general rule of thumb is to allow one hour for sprint review every one week of sprint length. That means teams should timebox sprint review to two hours for a two-week sprint and four hours for a one-month sprint.

## **Scrum Events: Sprint Retrospective**

The final event in the sprint is the Sprint Retrospective. During this time, the Scrum Team reflects on what can be improved for future sprints and how to achieve those improvements. The essence of Scrum acknowledges that there is always room for enhancement, and the Sprint Retrospective provides a dedicated opportunity for the team to identify, discuss, and plan these improvements. The participation of the entire Scrum Team, including the Developers, Scrum Master, and Product Owner, is essential for this event. It should be a collaborative effort, mirroring the principles of Scrum and Agile. Unlike the Sprint Review, other stakeholders are not typically invited to the retrospective.

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<sup>6</sup> Scrum Event: Sprint Review maps to Rule of Professional Conduct 1.4 Communication.

To differentiate between the Sprint Review and Sprint Retrospective, remember that the Sprint Review focuses on the product, while the Sprint Retrospective centers on the people and process involved.

Sprint retrospectives are time-boxed and should not exceed three hours. The general guideline is to allocate 45 minutes for each week of the sprint's duration. For instance, a two-week sprint would have a maximum retrospective time of an hour and a half, while a four-week sprint would have a three-hour time limit.

Agile/Scrum is a less rigid approach to project management. It can be particularly beneficial in situations where the project scope is relatively undefined, but there are fixed budget and schedule constraints. Alternatively, you may find value in adopting a hybrid method that combines processes and tools from both traditional and Agile project management, tailored specifically to your law practice.



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