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ADVANCED SCRUM MASTER
PRACTICE GUIDE

By: Eugene Lai

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Within the world of Agile and Scrum development, the role of the Scrum Master is arguably the most complex and misunderstood role for organizations that seek to adopt the Scrum framework. One reason is that many Scrum Masters transition into this role from other positions such as a Project Manager or a Functional Manager and are not provided with the opportunity to acquire formal training or coaching. To further exacerbate the situation, the proliferation of industry certifications that provide credentials without validation of expertise or knowledge has created a market that is full of under-qualified team members who are not equipped to perform this role effectively. This poses a tremendous risk to organizations as well as individuals who aspire to operate their respective teams.

This practice guide was crafted with ambitious Scrum Masters in mind with the goal of offering alternative options for building expertise in this role. This guide is intended to assist passionate Agilists to continue cultivating a growth mindset by evaluating current strengths and opportunities for improvement. In support of this goal, the Skills Assessment is a tool for Scrum practitioners who may have acquired formal or informal training as well as direct project experience. This tool may be used as a benchmark to determine targeted areas for further development. Note that this assessment may be taken multiple times to provide a snapshot of capabilities at different stages of individual development.

The second half of this guide consists of a series of tools and techniques that are seldom found in formal Scrum Master training courses. This section provides recommendations which may be used as-is, or as a foundation for further exploration and customization to fit specific project and organizational context. These tools may be applied during various project stages on an individual basis, or as an integrated approach to address specific project concerns. Note that the tools are intended to encourage additional exploration and experimentation within the Scrum ecosystem regardless of the level of maturity of a specific team or organization.

SCRUM MASTER SKILL ASSESSMENT

Instructions:

1. Review each question and provide one of the following responses:

    (1) Strongly Disagree

    (2) Somewhat Disagree

    (3) Somewhat Agree

    (4) Strongly Agree

2. Add scores from all questions to determine a total score.

3. Determine assessment and recommendation using the reference table.

QUESTIONS	SCORE (1-4)
[1] I follow a checklist for all Scrum events to ensure I'm doing things consistently	
[2] I am comfortable applying at least 3 different formats for Retrospectives	
[3] I feel confident about my ability to support the Product Owner to create and maintain the Product Backlog	
[4] The team(s) I support consistently complete their planned work within the sprint successfully (>=90% of the time)	
[5] I am comfortable facilitating all Scrum events without referring to a checklist	
[6] The team(s) I support consistently finish Scrum meetings within the planned timebox	
[7] The team(s) I support understand how to self-organize and hold effective meetings without my presence	
[8] The Product Owner within my team conducts product demos to stakeholders on a regular basis	
[9] The team(s) I support consistently follow through on process improvement ideas that are identified during Retrospectives (>=90% of the time)	
[10] The team(s) I support regularly seek opportunities to improve interactions, processes and/or tools.	

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Score Rating Recommendation

TOTAL SCORE	ASSESSMENTS	RECOMMENDATIONS
30 or higher	You have demonstrated strong expertise in developing a growth mindset for your team. You are versatile and able to coach and mentor your team when needed.	You are ready to expand beyond the boundaries of a single team, if you have not done so already. You will benefit from exploring scaling methods such as Scaled Agile Framework (SAFe) or Scrum at Scale in preparation to support multi-team projects with greater levels of complexity. Potential development opportunities include SAFe Advanced Scrum Master (SASM) training and SAFe Release Train Engineer (RTE) training.
Between 25 and 29	You are seen as a skilled Scrum Master with a solid track record of performance. You have mastered most of the fundamentals of Scrum, and may be able to improve on certain practices to continue your development.	You are considered an expert Scrum Master by your peers based on your consistent demonstration of foundational concepts and practices. You will likely benefit from learning additional techniques for facilitating various events such as Sprint Retrospectives. Also, acquiring additional training (such as SAFe Scrum Master) may accelerate your development.
Between 20 and 24	You have achieved some success and have begun to build rapport with your team. You may not feel as confident in your capabilities with regards to some techniques due to lack of opportunities to acquire direct experience, or absence of a formal mentor.	You have some knowledge of Scrum patterns and anti-patterns, and will likely continue your learning through project experience. Also, you will likely benefit from seeking a formal training and coaching to enhance your development.
Between 10 and 19	You have limited exposure to Scrum projects because you may have been given the Scrum Master role as a secondary, part-time responsibility. Your organization may not have made a formal commitment to provide you with training or mentorship.	You may have learned the Scrum Master role from other team members or through self-study. Hence, you will benefit from taking a training class (such as Professional Scrum Master I; Scrum.org) to gain a solid understanding of the Scrum framework.

ADVANCED SCRUM MASTER ROLES

In order to progress from a Scrum Master to an Advanced Scrum Master, it is important to acquire specific expertise and skills that will add value to not only a single team, but the entire community of Agile/Scrum practitioners. To be considered "Advanced", even the most skilled Scrum Masters must excel in a variety of roles as the team and the organization expands its capabilities.
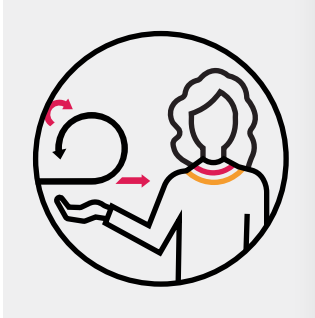
As indicated in the Scrum Guide, a Scrum Master is expected to serve the team as a "coach". Since there are many different definitions regarding the competencies of a "coach", this criterion is often interpreted in a variety of ways depending on organizational and business context.

To clarify this domain, this guide will offer a few recommendations regarding diverse roles that Scrum Masters should explore in pursuit of becoming an expert in this field.
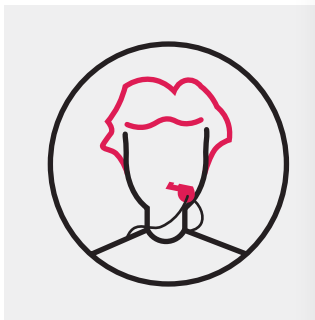
Scrum Master as "the Teacher"

One of the key skills that a Scrum Master must perfect is the ability to teach effectively because the team must understand the basic principles in order to apply the techniques in an effective way. As a result, the Scrum Master must confidently explain key concepts and also demonstrate the real-world application of the concepts to ensure the team is equipped with the knowledge to succeed.

Scrum Master as "the Model"

Most Scrum Masters who have achieved successes are likely to be very capable communicators and influencers who are skilled in guiding a team. Teaching the team how to practice Scrum effectively is a basic skill that most experienced Scrum Masters understand. However, in order to attain expert status, a Scrum Master must understand how to naturally model the desired behaviors and utilize a variety of communication styles to inspire the team as well as the organization to fulfill their potential.

Scrum Master as "the Coach"

For a Scrum Master to reach "expert" status, they must grow beyond the day-to-day, tactical operation of the team. They must evolve into a mentor and help the team grow and develop in ways that may unexpectedly determine the success or failure of the team. As the coach for the team, the Scrum Master will be expected to cultivate strong relationships within the team as well as with key stakeholders external to the team. The strength of these connections will significantly impact the level of performance for the team as an integrated unit.

Scrum Master as "the Change Agent"

Once a Scrum team has gained a sufficient level of experience working together, they are likely to have built a mindset of continuous improvement. However, this may not always be the case. For a Scrum team to deliver its highest level of performance, they will need support from the Scrum Master. Since the agile mindset is derived from the ability to adapt and change in an effective and sustainable way, change management is a key skill that the team must acquire with guidance from the Scrum Master. As the change enabler, the Scrum Master must learn how to introduce and implement change within the team and create a dynamic that embraces change. In essence, the Scrum Master needs to understand how much change the team can absorb and strike a delicate balance between too much and too little change.

FACILITATION TECHNIQUES

One of the most misunderstood concepts in the Scrum Master's responsibilities is the practice of facilitation. Regardless of the level of experience, the art of facilitation is a key skill that even the most seasoned Scrum Masters must refine and hone continuously. More often than not, a Scrum Master's ability to support the team as an effective facilitator can impact the overall performance of the team.

6 Faciliation Factors to Consider as a Scrum Master

1. Be genuine – To inspire the team to work effectively together and achieve results, the Scrum Master must act with integrity and consistency, which are critical in building trust within the team. Learn to be transparent about your strengths and weaknesses and you will earn the respect of your peers faster.

2. Be objective and neutral – The ability to act as the mediator and help the team navigate conflicts and challenges is an important skill that all Scrum Masters must acquire. Being a neutral party encourages the team to self-manage and teaches the team to resolve issues effectively.
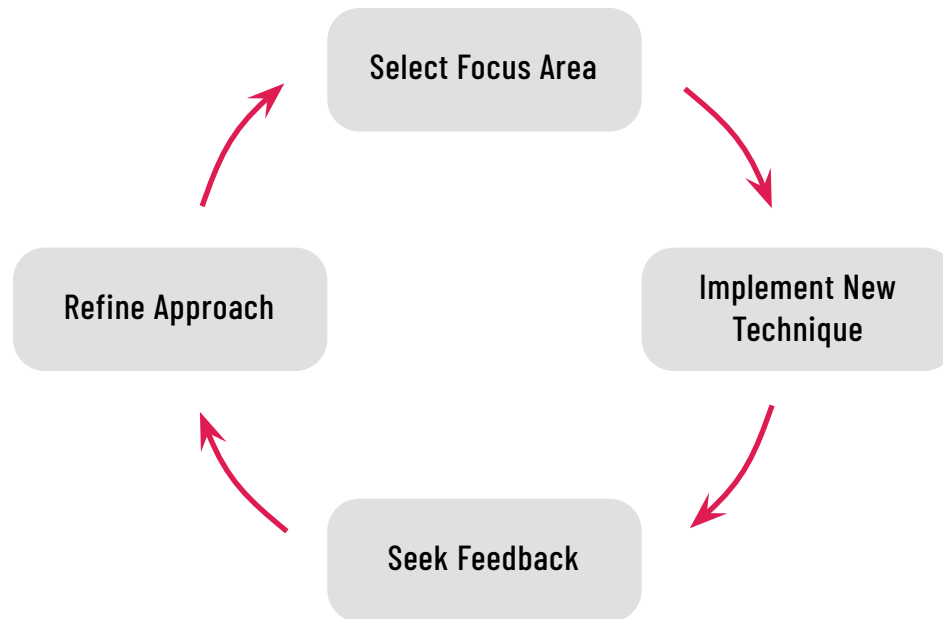
3. Create a mindset of continuous learning – An Agile team cannot achieve its maximum potential unless the team members can collectively build a culture of relentless improvement. This begins with the Scrum Master who has the opportunity to set the tone for the entire team.

4. Harness the power of collective intelligence – The Scrum Master must bring the team together and help them collaborate effectively, allowing individuals to contribute their core strengths and complement each other when the situation arises.

5. Collective ownership – The Scrum Master must encourage the team to be accountable to each other and make decisions for the benefit of the team instead of the individual.

6. Focus and engagement – The team relies on the Scrum Master to help instill focus which is absolutely critical; focus can take a variety of forms, including staying within pre-determined timeboxes for a given Scrum event, ensuring that the team is working on the right priorities, helping the team resolve impediments, or guiding the team towards an important decision in a timely manner.

In an effort to improve facilitation skills, a Scrum Master can implement an iterative and incremental approach which is more likely to be effective over time. As with implementing a process change, changes in facilitation approach can be more effective and sustainable when applied with an experimental mindset.

Select Focus Area

Implement New Technique

Seek Feedback

Refine Approach

ADVANCED SCRUM MASTER TOOLS

For seasoned Scrum Masters who have acquired expert-level knowledge and understanding of Scrum values, events, roles and artifacts, fulfilling everyday responsibilities is likely not a challenging proposition. At this stage of a Scrum Master's development, the focus of the role will begin to shift from helping the team master rudimentary practices to more strategic activities such as organizational change management and scaling.

Experienced Scrum Masters will often face new challenges as the organization seeks to grow beyond a single team and apply similar approaches to different functions within the company. In addition, other factors such as the desire to build larger and more sophisticated solutions will often present new challenges and rewards for Scrum Masters who are positioned to expand their influence within this domain. The following section will explore some of the common tools and strategies that a veteran Scrum Master will likely encounter in his/her career.

Knoster Model for Managing Complex Change

Ideally, in any change initiative, the organization has made a commitment to adopt a formal approach to manage the change to achieve maximum benefit. While there is a variety of change management strategies in use today, the fundamentals are similar; most documented strategies will generally accommodate the five basic attributes that serve as critical areas of focus, which includes vision, skills, incentives, resources and an action plan.

The Knoster model focuses on these five inputs of managing change which enables change agents to determine potential failures in any change initiative. Depending on the situation and the absence of any of the five key inputs, a potential failure mode can be expected. This is a powerful tool that may be used by the Scrum Master to assess potential root cause for ineffective change applied within an Agile/Scrum team; this tool may be applied to any change, regardless of scope, effort or complexity (such as a change to a technique, tool, or process). In addition, Scrum Masters may also use this tool to initiate change within a new team by assessing the current challenges and known risks within the organization.

As described by this model, if any of the five key inputs – Vision, Skills, Incentives, Resources, or Action Plan – is missing prior to implementation of a change, there is a high probability that the team will experience at least one of the resulting symptoms. Furthermore, if multiple attributes are missing, the team will likely encounter compounded negative effects.

Vision	Skills	Incentives	Resources	Action Plan	*Success*
Missing	Skills	Incentives	Resources	Action Plan	*Confusion*
Vision	Missing	Incentives	Resources	Action Plan	*Anxiety*
Vision	Skills	Missing	Resources	Action Plan	*Resistance*
Vision	Skills	Incentives	Missing	Action Plan	*Frustration*
Vision	Skills	Incentives	Resources	Missing	*False Start*

Vision – If a change initiative lacks vision, the contributors and teams will be confused by misconceptions and uncertainty because they do not understand the purpose nor the value of undergoing drastic change. In this situation, the Scrum Master must take action and help the team connect with the broader organizational objectives to ensure clarity and alignment. This may be achieved through regular engagement with the Product Owner and/or key stakeholders who can communicate the purpose and the desired end state.

For example, hold regular check-in meetings with the project sponsor to clarify the vision. Another situation where vision is important is process improvement changes that are revealed during Retrospectives. In this case, the Scrum Master has the opportunity and the responsibility to help the team understand the value of continuous improvement by articulating the vision to which the team should aspire.

Skills – In today's economy of knowledge-workers, many teams are driven primarily by their technical skills and expertise. Hence, if an organization lacks the proper training or experience to adopt a new method of working, this will often result in anxiety amongst the team, which creates stress and resistance. As a result, the team will rely on the Scrum Master to provide the necessary training and coaching to learn the requisite skills in order to be effective. For example, execute hands-on workshops to demonstrate how to plan short, incremental delivery cycles (i.e. sprints).

Incentives – Teams often struggle to adopt change because they do not see the benefit at the individual or organization level, which will likely result in active or passive resistance. Incentive does not necessarily need to involve monetary compensation. Many studies have shown that autonomy (freedom), mastery (skill) and purpose (vision) are often more powerful motivators as compared to financial incentives.

In this case, the Scrum Master may seek to provide insights into growth opportunities for the team such as additional training opportunities or broader visibility within the organization. In most cases, Scrum Masters will likely not have any formal authority to reward team members; however, they can collaborate with the Product Owner and/or project sponsors to invest in this area to ensure the team is inspired to do their best work in both the short and long-term.

Resources – Quite often, an organization claims to be committed to change, yet does not provide the necessary resources in terms of funding or tools to enable the change to be executed successfully. This can lead to frustration due to lack of progress. When a team encounters this situation, the Scrum Master should collaborate with the Product Owner and stakeholders to secure appropriate resources to support the change; this may include training budgets or licenses for key tools for the team.

Action Plan – If an organization can secure all the key components that enables effective change, there must be a tangible, realistic action plan for the team to follow; the Scrum Master has the responsibility to engage the team to assist in developing a reasonable plan that the team will commit to and feel confident about executing successfully. Although a project plan is not a typical deliverable for which Scrum Masters are responsible, the Scrum Master should consider drafting a roadmap of key outputs and outcomes. It is important to note that the plan does not necessarily need to be defined in extreme detail; conversely, a high-level plan can provide the team with more flexibility as the team gains a deeper understanding of the customer or stakeholder needs.
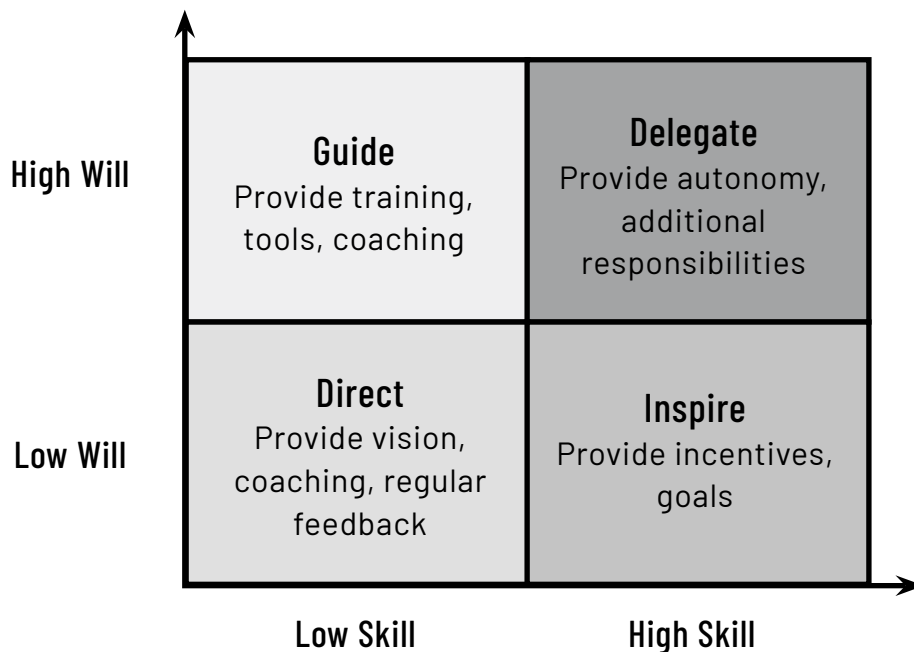
In summary, as a key change enabler for the Scrum team, the Scrum Master must invest time and effort to continuously evaluate the state of the team within each of the five dimensions, then determine an approach to address any shortcomings. Although the Scrum Master may not have the authority to address all of the issues directly, he/she should be empowered to communicate the known issues and enlist support from the project sponsors and stakeholders.

Skill and Will Matrix

As a team champion, the Scrum Master should have a solid understanding of the team members and their level of expertise for specific domains. In addition, the Scrum Master should have a strong rapport with the team and understand the source of intrinsic motivation to perform their best work. The Skill and Will Matrix is another powerful tool that can assist Scrum Masters to evaluate where individual team members reside in terms of their capabilities and drive to perform a specific set of tasks.
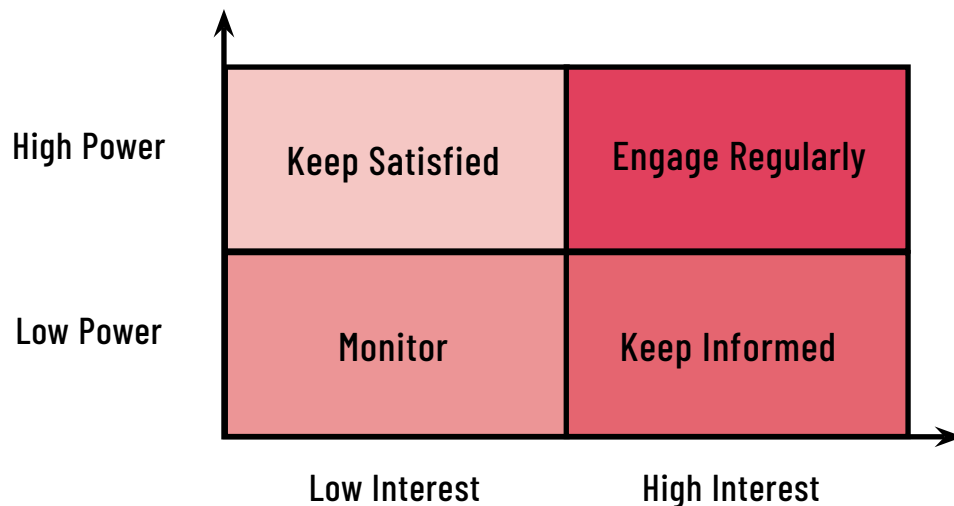
The Scrum Master has many options when working to develop a high-performing team. Depending on the situation for each specific team member, the Scrum Master may need to implement one of the four possible techniques in order to increase the skill level and/or the motivation for each individual. Team members that possess low will and low skill will likely require the most attention and effort. Conversely, team members that are highly-skilled and driven to achieve results will not demand much time from the Scrum Master. It is important for the Scrum Master (as well as the team as a whole) to regularly assess where the team stands in terms of overall skills, which is generally more easily addressed as a collective unit. For issues related to incentives or motivation, the Scrum Master should collaborate with the Product Owner and sponsors to remedy any impediments that may be hampering the progress of the team.

	Low Skill	High Skill
High Will	**Guide** Provide training, tools, coaching	**Delegate** Provide autonomy, additional responsibilities
Low Will	**Direct** Provide vision, coaching, regular feedback	**Inspire** Provide incentives, goals

The Skill and Will Matrix will enable the Scrum Master to uncover opportunities for mentoring, training or coaching within a team and formulate an engagement approach. The specific areas of focus may vary depending on organizational cultural norms. For example, some organization may prefer to invest more time and effort on high-skill/high-will team members whereas others may choose to dedicate more energy towards low-will/low-skill contributors.

Power and Interest Matrix

One of the most popular tools used in traditional project management to support stakeholder management is the Power and Interest Matrix. Within the Agile domain, however, this tool is not referenced in most formal publications such as the Scrum Guide or framework publications. Within the context of Agile/Scrum teams, this matrix (also commonly known as the "Influence and Interest Matrix"), remains a useful tool that can be applied for any project that utilizes Agile techniques.

	Low Interest	High Interest
High Power	Keep Satisfied	Engage Regularly
Low Power	Monitor	Keep Informed

From the perspective of the Scrum team, stakeholder management is typically a responsibility of the Product Owner. However, the Scrum Master should be involved in this process as well to ensure that adequate attention is given to key sponsors if there is an escalation of risks and issues in critical situations. One of the common mistakes that Scrum Masters make is lack of energy invested in building and maintaining a strong rapport with senior management stakeholders, which can extend the time required to resolve issues. The team will benefit greatly as a whole from a collaborative approach in stakeholder management which includes the Product Owner as well as the Scrum Master.

The role of the Scrum Master is arguably the most challenging role to learn within the Scrum framework. Due to its complexity, the Scrum Master role requires a professional to be multi-faceted and be able to change roles quickly and effectively with minimal notice. Hence, the journey from an experienced Scrum Master to an Advanced Scrum Master is a long and thought-provoking path that will demand a high level of commitment. By applying a growth mindset and a commitment to continuous learning, any passionate agile practitioner can achieve a rewarding career by making this journey in a methodical fashion.

ABOUT THE AUTHOR

Mr. Eugene Lai is a seasoned innovator in Information Technology and process engineering with over 20 years of proven track record delivering high-impact solutions within PMOs and Agile teams. In previous roles as Lead Software Engineer, Chief Scrum Master, Principal Program Manager, VP of Project Management, PMO Director, Technical Consultant and Agile Advisor, Mr. Lai has successfully applied process lifecycle frameworks and delivered complex solutions to various Fortune 500 financial services companies and U.S. Department of Defense customers across the globe.

Mr. Lai has provided consulting services to organizations such as Project Management Institute (PMI), Scrum Alliance, and Cprime Learning. Over the past 12 years, Mr. Lai has orchestrated Program Management and Agile Engineering initiatives by applying a variety of methodologies and frameworks such as Traditional Waterfall/SDLC, Large Scale Scrum (LeSS), Scaled Agile Framework (SAFe), Scrum and Kanban. Mr. Lai has architected 5 corporate PMOs and successfully executed Agile transformation efforts for 6 different organizations.

Mr. Lai currently holds several professional certifications including: Certified Scrum Master (CSM/PSM), Microsoft Certified Technology Specialist, Professional Scrum Product Owner (PSPO), Scaled Agile Program Consultant (SPC), Agile Certified Practitioner (PMI-ACP), Project Management Professional (PMP), and Program Management Professional (PgMP).

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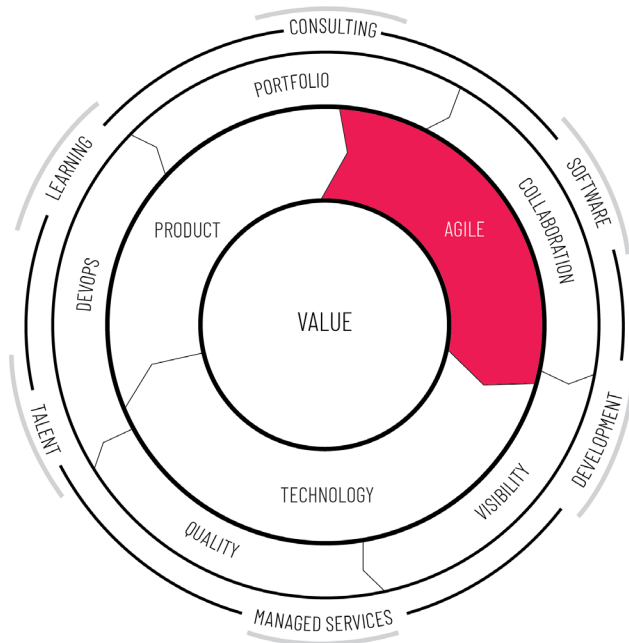Read up on transformations and key results from companies across the globe who have utilized Cprime.

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