



Done

A white paper from 3Back, LLC



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How do we Get to Done?

Below is a simple equation to help us think about what Done means.

$$\text{DoD} = (\text{SoC} + \text{GA} + \text{TN} + \text{AC}) + \text{DD}$$

In this white paper, we will explore how we use a simple equation for done to help us think about how we “Get to Done” for any kind of work within constraints. To help us understand Done, we will tell a short story. Our short story will help us understand how Done begins as a journey toward a goal and ends when a Definition of Done is met. After our short story, we will generalize the use of our simple equation. Additionally, we will explore how a Definition of Done is often used in a stilted manner by failing to begin with a Standard of Care. We will conclude with an understanding of Done that is far more powerful for managing work.

Recommended Reading:

[Well-Formed Team White Paper](#)

[Agility White Paper](#)

[Leadership White Paper](#)

[Scaling White Paper](#)

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A Short Story: Planting Maple Trees

Mrs. Jones has bought a new house and has always dreamt of having 4 redwood maple trees, 1 planted on each corner of her beautiful property. Mrs. Jones would like the trees to be as tall as possible without spending too much money. She does not want knee-high maple trees.

Mrs. Jones observes people planting trees in her new neighborhood that are quite taller than 8 feet, so she goes to investigate trees at a local nursery. At the nursery, Mrs. Jones sees redwood maple trees, her favorite variety, that are 14 feet tall. She is told these trees could be planted at her house if conditions are suitable. She is then given the name of a reputable landscape contractor. After a satisfying day at the nursery, Mrs. Jones decides these beautiful 14-foot maple trees would be perfect around her home.



Figure 1: Mrs. Jones' redwood maple tree dream

Mrs. Jones contacts the landscape company and shares her dream with them. She describes the thought of seeing pretty red maple leaves from her house windows and how she enjoys the simple symmetry of a maple at each corner of her property.

The landscape company provides a quote for 4 14-foot trees planted with warranties on the four corners of Mrs. Jones' property. The landscape company carefully explains the quote and accompanying agreement with constraints, including issues related to discovery that are beyond their control. Upon review, Mrs. Jones signs the agreement with the landscape company to have 4 trees planted.

Acceptance Criteria (AC) for Mrs. Jones' Maple Trees

- 4 matching 14-foot tall redwood maple trees
- 1 tree symmetrically positioned at each of the four corners of her new property

The landscape company decides to send one of their best 3-person crews to plant Mrs. Jones' trees. The people on the crew are Sam, Sarah and Joseph. The landscape crew has developed a good relationship over the years, and each Team member has grown to understand each other's strengths and weaknesses. In other words, they are a Well-Formed Team¹. The Team members know that Sam is great at talking directly with customers, Sarah typically lays out how they will approach the work, Joseph knows trees and has a great eye for beautiful landscapes.

¹ Reference: Well-Formed Team <http://3back.com/well-formed-team>

Team Norms (TN) for Landscape Crew

- Sam talks well with customers
- Sarah lays out job site
- Joseph focuses on beautiful work

Sarah does an initial walkthrough of the job site and determines that they can use the planting truck to drop 3 of the trees but not the 4th. She determines that they can drive the truck close in from the street and she obtains permission to drive on the vacant lot but not the finished yard. Additionally, Sarah calls “diggers hotline” to have the area marked to avoid buried mechanicals (electric, gas, sewage). All 4 trees can be planted where Mrs. Jones has requested, based on Sarah’s initial walkthrough. Note: Work is adjusted within agreement constraints from the original quote.

General Agreements (GA) for Planting Mrs. Jones’ Maple Trees

- 3 of 4 trees can be planted using the digger truck
- 1 tree will have to be dug in by hand, and an additional charge will apply

Due Diligence (DD) for Planting Mrs. Jones’ Maple Trees

- Initial walkthrough and layout of job site
- The areas are marked safe for digging

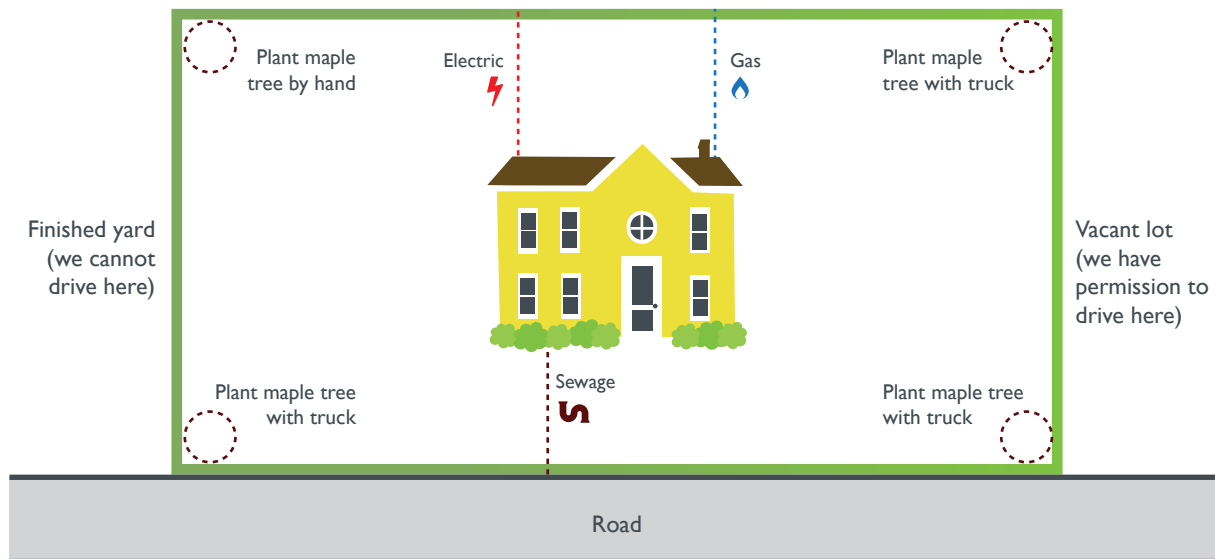


Figure 2: Planting layout designed by Sarah

Sam, Joseph and Sarah start the morning early and begin working on planting the trees. For each tree, they dig the hole 1.5 times the trees ball depth, water-test the hole, position the tree for best angle of branches as it grows, fill in the bottom side with a peaty dirt for better root growth, review the surrounding location, confirm unobstructed sky above the tree and fertilize the hole. They are professionals, and as such, they use a Standard of Care for their work (they are not hacks or jacks-of-all-trades). Sam chats with Mrs. Jones about how they will position the tree for optimal growth, and Mrs. Jones is delighted at the additional refined Acceptance Criteria.

Standard of Care (SoC) for Planting Redwood Maple Trees

- Plant tree 1.5 times the ball depth
- Water test hole for drainage
- Review surrounding location
- Fill in bottom 20 inches of hole with peaty dirt (dirt mixed with peat moss)
- Confirm unobstructed sky above tree
- Fertilize hole

Additional Refined Acceptance Criteria (AC) for Mrs. Jones' Redwood Maple Trees

- Position tree for best angle as it grows when viewed from house window

As Joseph reviews the last tree they are planting (that will have to be dug in by hand), he notices that there is a culvert (low-lying drainage area). Culverts can experience significant runoff during rainy periods. Joseph knows Redwood Maple trees don't grow well in culverts with significant runoff. Joseph calls over Sarah and Sam to review the problem. As a Team, they decide it is too risky to plant the Redwood Maple tree in the culvert where it will likely be stunted and die prematurely from runoff. They decide as a Team that they cannot warranty the tree based on the current Acceptance Criteria.

The crew decides that Sam, who is great with customers, will discuss the problem with Mrs. Jones (the Team relies on emergent leadership)². Sam carefully explains the problem that one of the trees cannot be planted without long-term problems for growth. After a friendly discussion with Mrs. Jones, an agreement is reached to move the tree 3 yards closer to the house and sacrifice some of the symmetry she desired. Mrs. Jones is still happy because now she has a warranted tree that will still produce beautiful leaves and shade in her yard all summer long. Note: Work is adjusted within agreement constraints from the original quote.

Standard of Care (SoC) for Planting Redwood Maple Trees

- Plant tree with good drainage, not in culvert

Team Norm (TN) for Landscape Crew

- They use a participatory style to analyze problem and generate options
- Sam agrees to talk with Mrs. Jones about the options

Acceptance Criteria (AC) for Mrs. Jones' Trees

- One tree will be moved 3 yards closer to the house
- The symmetry constraint will be relaxed
- Warranty for all 4 trees will be honored

Due Diligence (DD) for Mrs. Jones' Maple Trees

- Landscape Team uses good judgment to devise options
- Landscape Team provides options to client

² Reference: *Leadership* <http://3back.com/leadership>



Figure 3: Reality of Mrs. Jones' maple trees

The Team finishes planting all 4 trees. Mrs. Jones reviews the work and is delighted that she has four warranted Redwood Maple Trees growing in her new yard.

Definition of Done (DoD) for Planting Mrs. Jones' Redwood Maple Trees

- SoC - planting Redwood Maples
- TN - Landscape Crew is a good Team
- DD - reasonable care was taken
- AC - discovered and met
- GA - used to help move the job along and keep cost down

$$\text{DoD} = (\text{SoC} + \text{GA} + \text{TN} + \text{AC}) + \text{DD}$$

The landscape crew did not achieve Mrs. Jones' perfect dream, but it is close, and they are Done. The landscape crew used Agility and adapted to reality³. The landscape crew found a way to "Get to Done."

Discussion

Note: The discussion section is a much heavier read because it focuses on generalizing the concept. The reader might want to read it twice or skip to the summary section at the end.

Our discussion will center around generalizing our simple equation to help us make deeper use of the model.

So let's consider a common question facing many Teams today: Get **it** done? Or get **to** done? What is the difference between **to** and **it**? How does framing the question with **to** or **it** shift attention? What change in awareness does it cause?

The word **to** is meant to cause a lifting of the eyes and focus on the horizon. The word **to** implies a journey. The word **it** typically focuses our eyes at our feet and reduces consideration of where we are going and why. The ability to shift attention to the framing of the question causes a change in awareness and how we think about our work.

³ Reference: Agility <http://3back.com/agility>

The shift in awareness is nothing new, we have many phrases in common use that cause this shift. For example, “look before you leap,” “start with the end in mind,” “if you don’t know where you are going, anywhere will do,” “test driven development,” “interface first,” “the answer is 42, what does that mean,” etc.



When the work being done is trivial then the shift in awareness caused by **to** is unnecessary and often in the way of simply doing the job. As getting to done becomes more complex and involved we often find ourselves in an interesting mix of work that is not obvious on how to get **to** done. Now that shift in awareness is helpful. Then our simple equation for getting to done becomes a useful model that can help us pick apart complex work.

- AC - typically comes from users or clients
- SoC - brought by professionals who know how to do their job
- TN - a good Team will bring a good working relationship
- GA - boundaries, constraints, and guidance on how we approach the work
- DD - must be used along the way to ensure thoroughness and quality
- DoD - what we meet by doing all the little parts

Shifting our awareness brings up the question what does *Done* mean and how will I know when I am finished?

Professionalism



Before diving into further discussion, we need to visit the concept of professionalism.

The term **Professionalism** is something that can be observed by contrasting *the standing, practice, or methods of a professional, as distinguished from an amateur*. Professionals take steps to ensure the quality of their work and safeguard the diminishment of their practice. Professionalism is something that is implicit in our work. Professionals strive for a balance between productivity and over perfecting.

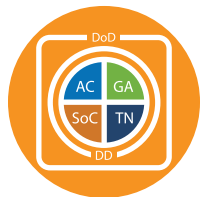
We may hire coders, testers, writers, analysts, whatever titles you need to use. But, as I mentioned before, professionalism is something that’s implicit no matter the job, and is a quality that must come first and foremost, often called “pride in craftsmanship.”

Professionalism can be described by examining the simple equation for Done:

- Professionals **use** a Standard of Care (SoC).
- Professionals **clarify** Acceptance Criteria (AC).
- Professionals **make** General Agreements (GA).
- Professionals **do** their Due Diligence (DD).
- Professionals **work well** with others’ Team Norms (TN).
- Professionals **meet** a Definition of Done (DoD).

The simple equation for Done helps professionals to detect and have the right conversations at the right time. The art of professionalism is in unfolding work fluidly, discovering and adapting as you go. The more complexity in the work stream, the more the art of professionalism matters. For professionals, quality is built into every step of their work. Quality is not an afterthought or “will fix it later” mindset. Professionals are adept at the art of their work.

Definition of Done



The term **Definition of Done** is the description of *the objective criteria the Team will use to determine whether or not a is done*. The DoD includes all of the parts of work necessary to get to done and includes, (SoC + GA + TN + AC) modified by DD.

We already have words like “complete” and “finished” in the English language. Why has the Agile industry latched onto the concept of DoD? Why is the concept a core component of the Scrum framework? As always, the essence of DoD is not new, but it is a new way for people to become familiar with an old concept. Similar words for DoD have been “robustness criteria,” “done, done, done,” “defined outcome” etc.

How has the DoD been used in a stilted manner? DoD has been declared by some experts to be immutable at the beginning of a planning effort and not allowed to change once it is set. For example, someone makes a rule like “you cannot change the DoD after planning is complete,” that rule denies discovery and does not allow us to adjust our DoD when we do our DD. We are forced into a model where we must predict all the little bits of our work ahead of time without allowing any change to happen. Predicting ahead of time without allowing any change is characteristic of “waterfall.” It is ironic that we often see Agile practices fall into this same waterfall-like behavior. We break away from stilted use by starting with a SoC and finding Done.

Why do people make rules like “immutable DoD” that force you to be predictive? As humans, we want certainty and comfort that everything will go as planned, but rarely does it and that is why we need Agility. We need to adjust our plans and learn to use our plans to detect how to change rather than creating rules as a change resistor. In complex work, discovery is the norm; we should expect the unexpected regularly. By the time discovery has stopped happening, we have drifted into a highly controlled manufacturing-type process, in which case you are no longer doing development. Forcing process rules like “immutable DoD” by hammering on people to be perfect in planning upfront is counter productive. Inevitably, it causes people to hide the reality of what is happening in their work through meaningless generalizations (process fog) and reduces the overall adaptability of the organization. Accountability plummets, laissez-faire becomes the norm and, as a Team, we lose focus on unifying purpose. In other words, locking a DoD down before you have clarity on your work is harmful.

Acceptance Criteria



The term **Acceptance Criteria** is a description of *the objective criteria the Team will use to determine whether or not a Story achieves the Value it represents*. For any item, the Stakeholders asking for the results should have some idea of what is acceptable for this item.

AC may be either ambiguous or well-defined. It may be documented or undocumented. The idea is that the Deciders (those who are ultimately in a position to accept or reject an item) requesting the work have some idea about what the end result should be and that these ideas should be expressible objectively.

Each item of work must have acceptance criteria. Some bodies of work encompass multiple items for work. These larger bodies of work should include acceptance criteria insofar as they are applicable to the items of

work that are encompassed by that larger body. For example, “Login should take less than two seconds.” We’ve objectively quantified that regardless of the varieties of ways to log into a system or service, that two seconds is the level of acceptability. This piece of acceptability would apply to all concrete items of work that result from what was originally requested.

Even larger bodies of work, in size or scope of individual work items, or a body of work that contains individual work items, may also need acceptance criteria which bind together all the work as a cohesive unit. The acceptance criteria express the expected results or value the stakeholders are looking for, yet in the context of the objectives for that larger body of work. An example could be what are called a “release” of a product, which meet a need or purpose as expressed by stakeholders.

Next, let’s look into the Team’s collaboration.

Team Norms



The term **Team Norms** refers to *cultural values, customs, and traditions that guide an individual’s behavior, and reflect our understanding of what others do, and think they should do.* Therefore, Team Norms are socialized agreements about individual norms the Team collectively agree upon. These agreements then guide how they collaborate, as they go about actually working together.

This could mean that we agree we need to review one another’s designs, specifications, documents, code, scripts. Another way of looking at this is, “This is how I expect professionalism from you and your work, and you can expect of me and mine.”

Team norms are integral to the DoD because these norms ensure that what needs to happen has a built-in systemic mechanism of responsibility and accountability that can be counted on consistently.

The next part of the equation seems to vex people the first time they are mentioned. Many folks consider it a “generally understood” sort of thing in the working environment. However, it’s fairly common that a lot of these “unsaid understoods” are both lousy and, in the worst of cases, downright wrong. Or these things are contracts written in legal language that people assume are “generally understood”, when in fact they are not. We come to the term GA.

General Agreements



The term General Agreements refers to contracts, constraints, generally understood things and anything else we need to know to successfully complete the work. The GA can be from a regulatory authority (medical device regulation) or from the organization (our internal rules). The GA help the Team understand the boundaries in which they will accomplish the work and where to turn for specific guidance or help. GA might or might not be formally written down.

For example, who are the SMEs we will work with? What is explicitly in or out of scope for this item? Or, who is the Story Coordinator for a particular story?

Another example of these sorts of agreements may include information in support of situational need, such as “We need this by next Tuesday because...”

GA may have their genesis from within an organization, or be as a result of entities outside of the organization. Contractual obligations which must be adhered to while performing work for a particular purpose are a potential source for GA.

Standard of Care



The term **Standard of Care** is the use of *prudence, caution, processes, and procedures that professionals use when doing their work*. The SoC used depends on the type of work; each type of work intrinsically has its own SoC. A SoC captures re-useful information common to different types of work and is often captured in a formal manner. SoC is the repeatable aspects of work that allow us to detect and manage change; it serves as a baseline or reference point. Failure to meet the SoC is negligence, and being negligent makes you accountable for any damages that result.

Speaking in legalistic terms, not following a SoC is negligence. In the example cited for GA which derives contractual obligations, it's clear to see why a SoC is so important. In other circumstances, a Standard of Care is akin to calling out specifics about what should happen so the quality of what's being produced is maintained.

SoC as a concept has existed for hundreds of years in the work done by tradespersons. It's how we can trust to do something as simple as opening a door, and not having it fall on us, or someone else. It's something seemingly intrinsic, or "makes sense" to do. By specifying what our SoC is, often a simple check list, we enable quality to be considered up-front by default when we start a job. We can also use our up-front quality to type our work and enable Agility in analysis.

Live example:

"Sally talked about how her SoC deteriorated this Sprint. She mentioned how the first week of the Sprint was successful, but the second week she was rushing to get stories done. In doing so, the quality of her work went down and she was frustrated by this.

I want to make sure that all employees are not blinded by the rush of getting points to done and losing their Standard of Care."

Getting closer to DONE

So far, we've described the components of what we know about the DoD. With TN, we learned how we have to establish sound values and principles for our Teams, so our Team members know how to carry themselves with one another. With GA we learned that parts of **Done** could come from both inside and outside an organization, and why it's important to be clear about these agreements.

However, with all this information we have at our disposal, is this enough? Do we have enough **Done** to get started? Perhaps. But do we have enough to know what **Done** means and what **Done** should be for any item. The answer is, NO!

We're still missing a crucial aspect of DoD, and it's about the context the item is in. There are always things we need to think our way through as we go. Discovery will happen, and we will have to *pay attention* while we do the work. We will need our Agility to make those adjustments so that we can do the right things, the right way.

Enter, Due Diligence.

Due Diligence



The term **Due Diligence** is *doing what needs to be done to prevent harm*. DD applies to an individual, a Team, and an organization as a whole. Professionals do their DD when doing their work. Failure to do your DD is negligence. Doing your DD often modifies your work and affects all the little parts of our equation for DoD.

For example, an organization has applied an appropriate SoC when it has established a safe environment for its Team or Teams. That is, doing its DD on an organizational SoC.

Leaders apply an appropriate SoC by weighing the options before them and making decisions in a timely manner. Team members do their due diligence by applying the SoC necessitated by any item of work they undertake.

DD also applies to GA, TN and AC. An example of DD by a Leader is the engagement with Stakeholders to further clarify the objectives and needs of value or acceptability they express for an item of work and the conveyance of any of those clarifications into the item, so the Team can more effectively carry about the work of realizing that need or value.

In each of these examples of DD, there is an implicit reference to something that is being **Done** or has resulted from having been **Done**. That's why application is part of the definition, because it involves humans **Doing**.

Each application of DD must take into account that to which it is applied, to make sure you do what's appropriate in every particular item's context.

Summary

Managing work can become complicated. If we are only washing dinner plates, then the equation is overkill. However, as our work becomes increasingly complicated or complex, the power of this simple equation can really help us manage messy work by improving clarity.

Use the simple equation for Done to detect all of the little parts of your work. You do not have to write everything down as diligently as we did for in our "Mrs. Jones' Maple Trees" story. However, there are a few reasons why the discipline of writing things down can help.

- You might be training someone new, in which case making things explicit will help the new person develop the right habits.
- You might be seeking to change routine, in which case you can more easily detect the change you want to make.
- You might be required to show objective evidence that the required procedure was used (regulatory environments).

Finally, our simple equation helps Teams have the right conversations necessary to manage the work (collaborate as a Team) and find a way to finish. Professionals find a way to get to done.

$$\text{DoD} = (\text{SoC} + \text{GA} + \text{TN} + \text{AC}) + \text{DD}$$

Done.

About the Authors

Doug Shimp has worked in the technology field since 1992 and has played many key roles on software Teams, including Coder, Tester, Analyst, Team Leader, Manager, Coach, and Consultant. Doug's passion is for Team learning to improve product development, and he is a leader in the area of Agile/Scrum transitions and applied practices. He believes that the core basis for applied Agility is that *'You must see the result for it to be real; otherwise it is all just theory..'* Much of his experience with Teamwork and Agility comes from outside the software field, including an earlier career as an owner/manager of a painting company – which enabled him to learn about small-Team dynamics in a very hands-on way.

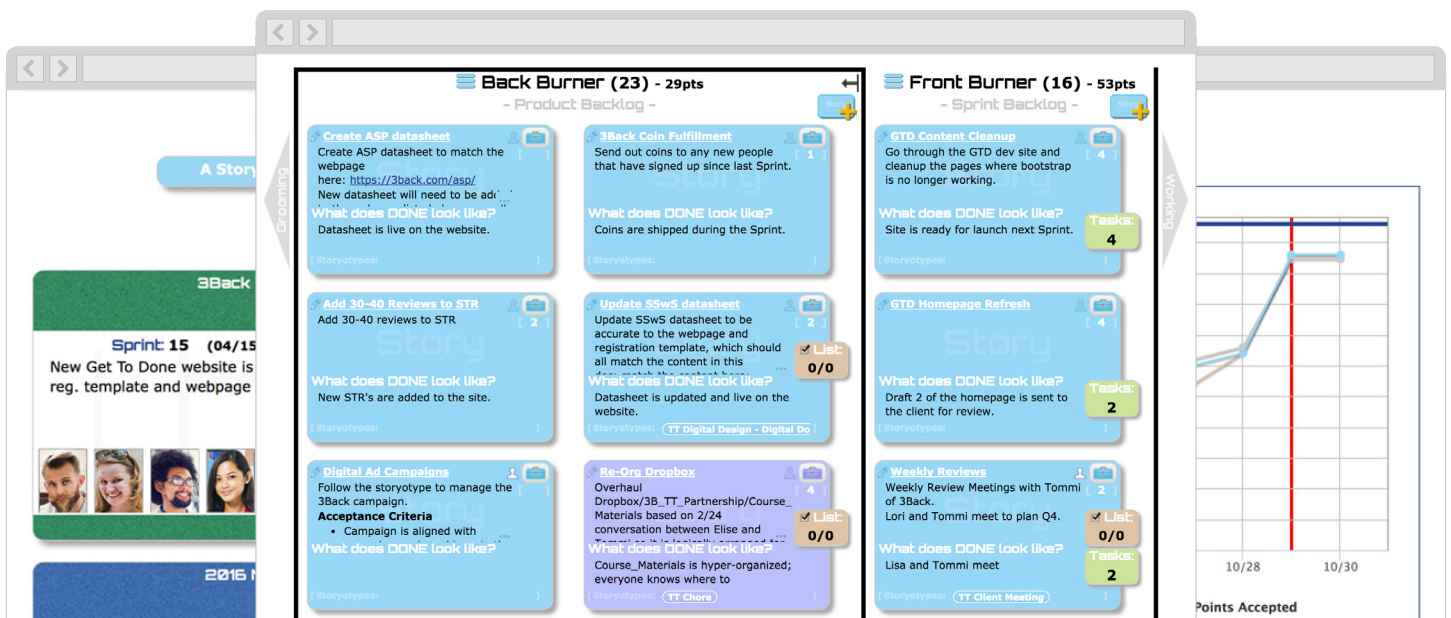
Dan Rawsthorne has developed software in an Agile way since 1983. He has worked in many different domains, from e-commerce to military avionics. He has a PhD in Mathematics (number theory), is a retired Army Officer, and a Professional Bowler and Coach. Dan is very active in the Agile/Scrum community and speaks quite often at conferences and seminars. He is a transformation agent, coaching Organizations to become more successful through Agility. His non-software background has helped him immeasurably in his coaching: his formal training in mathematics guides him to look for underlying problems rather than focus on surface symptoms; his military background helps him understand the importance of teamwork and empowerment; and his work with bowlers has helped him understand that coaching is a two-way street.

Marcelo Lopez Jr. has thirty years of coding experience in heavily-regulated industries, such as bio-medical device instrumentation and high-throughput financial transaction processing systems, using both traditional 'waterfall' methods, as well as a variety of Agile methodologies. In addition to coding, he has also held the roles of ScrumMaster and uber Product Owner, giving him unique insight and perspective as to how Agile can thrive within the constraints and rigid structures of these industries. In addition to being an Agile coach and Kanban trainer, Marcelo frequently speaks at user groups and conferences. His bilingual abilities have allowed him to teach Scrum and Agile on three continents so far.

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