CHECKLIST FOR RUNNING AN EFFECTIVE RETROSPECTIVE

As you prepare for and run your retrospective, you can easily overlook important details, especially in the heat of the moment. Use this checklist to help you stay on track.

BEFORE THE RETROSPECTIVE

☐	1	Send a calendar invitation for the retrospective. If this recurs on the same schedule, send a repeating invitation.
☐	2	Identify who will be participating.
☐	3	A week to a few days before the retrospective, ask participants to think about answers to the key questions: What went well and what needs improvement? What should we continue doing? What should we stop doing?
☐	4	Prepare your agenda including your choice of format, activities, and voting method.
☐	5	Make sure you have all the necessary materials for the activities as well as snacks if you plan to have them.
☐	6	Book a meeting room or get a link for your remote gathering. Update your invitation with this information if needed.

DURING THE RETROSPECTIVE

☐	7	As everyone gathers, note who is present at the meeting.
☐	8	If you want help sticking to your schedule, ask for a volunteer to be timekeeper.
☐	9	Proceed with your agenda. Make sure everyone understands that the goal of the meeting is to come away with concrete action plans.
☐	10	If your icebreaker or safety check uncovered trust issues, take some time to find out what would help people feel more uncomfortable, such as the ability to offer feedback anonymously.
☐	11	Take notes and record important discussion points. Taking photos of your whiteboard can be helpful reminders of the meeting.
☐	12	Go through the essential activities of review, brainstorm, prioritize solutions, and close out the meeting by summarizing action plans.

DURING THE RETROSPECTIVE continued

☐	13	For the review, come prepared with data such as a burndown chart or other metrics from the work period.
☐	14	For each action item, ask the person or team responsible how they will know when they have achieved the action item; whether they need help; what kind of support they need such as a connection to someone else in the organization or to be freed from a task so they can concentrate on the action item; and finally, how they will inform you and the team when the item is achieved. Note this information.
☐	15	Keep the meeting on time.
☐	16	After finalizing action items, take time to celebrate successes and share appreciation.
☐	17	Recap the action items the team agreed upon including who is responsible and the due dates. Ask the task owners to write the information down.
☐	18	Get feedback on how the meeting went, either with an activity or inviting comments. Inquire how participants felt about the length of the meeting and if it was a worthwhile use of their time.
☐	19	Say thank you.

AFTER THE RETROSPECTIVE

☐	20	Automate reminders about action items.
☐	21	Review your notes of the meeting to make sure nothing important is missing.
☐	22	On your agenda template for the next meeting, write down anything from the meeting that just ended that you think should have follow-up next time.
☐	23	Keep a running list of the formats and activities you use, the dates you use them, and how successful they were.

DISCLAIMER