Managing Your AI Teammate: Turning AI from Experiment to Strategic Partner

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Quick Guidelines

- Your microphones will be muted throughout
- This session is recorded. The recording and slides will be available after the webinar within 24 hours.
- Please ask questions!
  - Submit questions by selecting the Q & A icon: 

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Mission:
Helping People and Teams Solve Complex Problems

Ken Schwaber
Scrum.org Founder,
Chairman and
Co-creator of Scrum

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About Our Speaker

- Darrell Fernandes, Executive Advisor
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- “Agilist” since 1995
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The Current Challenge

Many organizations are experimenting with AI, but most are doing so without structure or strategy.

- **50% of companies** have adopted AI in at least one business function, but only **27% report significant bottom-line impact***
- **70% of AI initiatives fail** in execution
- Infrastructure demand will drive billions of new energy generation over the next 5 years.
- Teams waste money and achieve poor results from random experimentation

Why This Matters for Scrum Teams

The Agile Manifesto values "individuals and interactions over processes and tools."

When we treat AI as just another tool, we miss the opportunity to integrate it as a collaborative team member that enhances those interactions.

Consider how you onboard a new Scrum Team member:

- You clarify their role
- You provide context
- You establish communication patterns
- You evaluate and adapt their contributions

*McKinsey Global Institute

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The AI Teammate Framework

This webinar introduces a four-step framework that applies proven team management principles to AI integration:

1. **Model Management** (Hiring) - Defining and selecting the right AI
2. **Context Management** (Onboarding) - Providing necessary context
3. **Prompt Engineering** (Leveraging) - Optimizing interactions
4. **Governance Management** (Managing) - Evaluating and adapting performance

This framework respects Scrum values:

- **Commitment** - AI should support team goals, not distract from them
- **Focus** - Clear AI roles prevent scope creep and maintain Sprint focus
- **Openness** - Transparent AI capabilities and limitations build trust
- **Respect** - AI augments human capabilities without undermining professional development
- **Courage** - Systematic approach gives teams confidence to tackle complex problems

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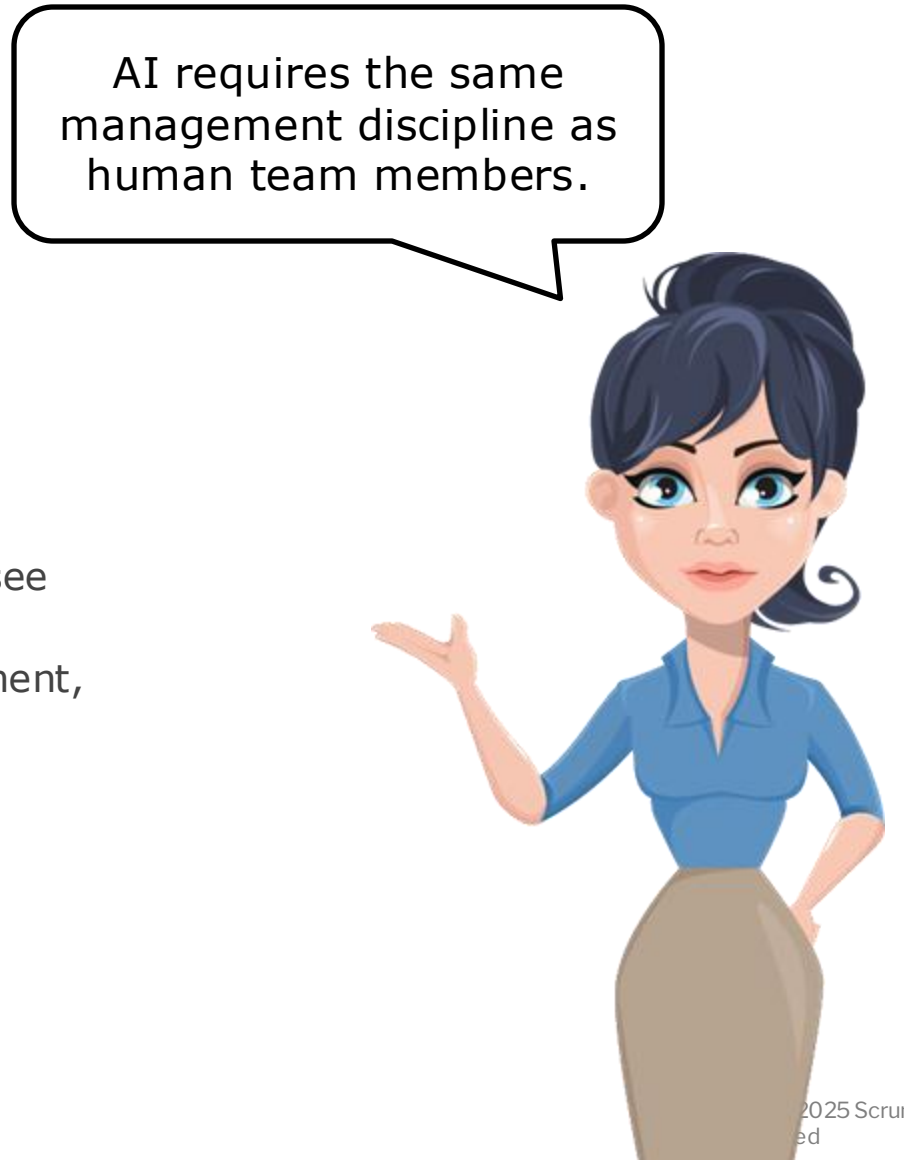
AI and Teams

Google's Project Aristotle identified **five factors** for team effectiveness:

1. Psychological safety
2. Dependability
3. Structure and clarity
4. Meaning
5. Impact

The AI Teammate Framework ensures AI integration supports these factors.



Critical Statistics

- Companies with AI strategies are 2.3x more likely to see revenue impact
- 70% of AI initiatives fail due to poor change management, not technology limitations
- Teams with clear AI governance show 40% higher satisfaction rates

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Understanding the AI Landscape

Just as you wouldn't hire someone without understanding what skills you need,
AI selection requires clarity about your team's requirements.

General-Purpose Models:

- **GPT-5 (OpenAI)**: Advanced reasoning, 32K+ token context, strong at diverse tasks
- **Claude (Anthropic)**: Excellent at nuanced understanding, long-form content, 200K token context
- **Gemini (Google)**: Multimodal capabilities, strong integration with Google tools

Specialized Solutions:

- **GitHub Copilot**: Code generation and completion
- **Microsoft Copilot**: Enterprise workflow integration
- **Domain-specific tools**: Data analysis, creative content, technical documentation

Key Selection Criteria

Research shows that teams with AI strategies are **2.3x more likely to see revenue impact**. The difference? Strategic selection based on three critical factors:

1. Product Goal Alignment
2. Team Capability Gaps
3. Delivery Integration

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Approaches

1. Product Assistant Agent

Your AI should advance long-term product objectives, not just solve immediate tactical problems.

2. Capability Gap Agent

"Scrum Teams are cross-functional, meaning the members have all the skills necessary to create value each Sprint."

3. Delivery Integration Agent

AI should support, not disrupt, your Sprint cadence and Definition of Done.

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Approaches, Cont'd

1. Product Assistant Agent

Your AI should advance long-term product objectives, not just solve immediate tactical problems.

Questions to ask:

- Does our AI need to understand technical documentation, user research, market analysis, or creative content?
- What specific outcomes would AI contributions enable?
- How does AI support our Definition of Done?

Example:
A team building developer tools needs AI strong at technical reasoning and code analysis. A team creating consumer experiences needs AI excellent at understanding user behavior and creative ideation.

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Approaches, Cont'd

2. Capability Gap Agent

"Scrum Teams are cross-functional, meaning the members have all the skills necessary to create value each Sprint."

AI becomes part of that cross-functional team, augmenting capabilities in specific areas.

Questions to ask:

- Where does our team need augmentation? (data analysis, user story refinement, technical documentation, strategic insights)
- What tasks consume disproportionate time that could be accelerated?
- What expertise would we hire for if we could add one more person?

Deloitte research shows teams with dedicated AI roles (clear responsibilities) show **60% faster implementation** than teams treating AI as a general tool.

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Approaches, Cont'd

3. Delivery Integration Agent

AI should support, not disrupt, your Sprint cadence and Definition of Done.

Questions to ask:

- Can this AI integrate with our existing tools (Jira, Confluence, development environments)?
- Does it support the empirical process of inspect and adapt?
- Will it maintain our sustainable pace or create dependencies?

Early-stage products benefit from AI that excels at generating hypotheses and facilitating rapid iteration.

Mature products might need AI focused on optimization, scaling, or maintenance tasks.

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How to "Interview" AI Options:

1. **Select real scenarios from your Product Backlog**
   - Choose 3-5 representative tasks your team regularly performs
   - Include both simple and complex examples
2. **Test with identical prompts across AI options**
   - Can the AI understand your domain?
   - Does it provide insights that enhance decision-making?
   - How do responses compare in quality, relevance, and actionability?
3. **Evaluate alignment with team values**
   - Does integration support openness and respect?
   - Will it enhance or undermine team collaboration?
   - Does it promote courage to tackle complex problems?
4. **Consider empirical evidence**
   - Document actual performance, not marketing claims
   - Test with real team members who will use the AI
   - Make selection decisions in Sprint Planning or Refinement

Constitutional AI Research Insights

Anthropic's research on Constitutional AI shows that:

- AI behavior is moldable through clear guidelines and consistent feedback
- Context and framing significantly impact output quality
- Systems can be trained to follow team-specific principles

Implication: The AI you select will adapt to your team's needs over time, but you need to choose one with the right foundational capabilities.

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Why Context Management Matters

Even the most capable team member struggles without proper context. Research shows that effective onboarding is critical for team performance:

- Google's Project Aristotle: Structure and clarity are essential for team effectiveness
- Microsoft Research: AI performance improves 20-50% with well-designed, context-aware prompts
- Atlassian Research: Teams with documented communication norms and shared vocabulary perform significantly better

The Context Challenge

When you bring a new person onto your Scrum Team, you provide:

- Team purpose and Product Goal
- Domain knowledge and terminology
- Communication norms and practices
- Role clarity within the team structure
- Decision-making authority and boundaries

Yet teams often expect AI to perform effectively with minimal context, leading to:

- Generic, irrelevant responses
- Misaligned recommendations
- Wasted time reformulating requests
- Team frustration and AI abandonment

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Pillars of Context Management

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Pillar 1 – Clear Communication

1. Establishing Clear Communication

Domain-Specific Language:

What to Document:

- Industry-specific acronyms and what they mean
- Internal terminology and how it's used
- Domain concepts and their relationships
- Product-specific vocabulary

Communication Patterns:

Establish how your team communicates to help AI match your style and expectations.

What to Document:

- Preferred output formats (bullet points vs. prose, technical vs. accessible)
- Level of detail expected (executive summary vs. comprehensive analysis)
- Tone and style (formal vs. conversational)
- How you handle uncertainty ("flag assumptions" vs. "provide best guess")

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Pillar 2 – Role Clarity

2. Clarifying Roles and Collaborative Structure

What to Define:

AI's Role Boundaries:

- What decisions can AI provide input on?
- What decisions are reserved for Product Owner, Developers, or Scrum Master?
- When should AI contribute to Backlog Refinement vs. Sprint Planning vs. Sprint Review?

Accountabilities Clarity:

- Who is accountable for AI-generated outputs?
- How do AI contributions support the Definition of Done?
- What level of human oversight is required for different AI tasks?

Collaboration Patterns:

- How does AI participation enhance team self-management?
- When should AI be "in the room" vs. used asynchronously?

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Pillar 3 – Sharing Context

3. Sharing Product Context

Your AI should understand the problem you're solving as thoroughly as any team member.

Essential Product Context:

Market and Customer Understanding:

- Who are your users, customers & key stakeholders?
- What problem does your product solve?
- What is your value proposition?

Product Vision and Strategy:

- What is your Product Goal?
- What are the strategic objectives?
- What constraints and challenges exist?
- How do you measure success?

Product History and Evolution:

- What has the team learned?
- What assumptions have been validated or invalidated?
- What technical decisions have been made?

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Context Considerations

Jobs to Be Done Framework Adaptation:

Apply Clayton Christensen's framework to AI context:

Functional Job: What specific tasks will AI perform for the team?
Emotional Job: How should AI interactions feel? (Confident? Exploratory? Supportive?)
Social Job: How should AI fit into team dynamics and stakeholder interactions?
Context: When and where should AI be engaged vs. not engaged?

Continuous Context Updates

Context management isn't a one-time setup—it requires ongoing attention, just like team knowledge sharing.

When to Update Context:

- **Sprint Review:** Product discoveries and stakeholder feedback
- **Sprint Retrospective:** Team learning about what works
- **Backlog Refinement:** Evolving understanding of user needs
- **Sprint Planning:** Strategic shifts or new Product Backlog priorities

Microsoft Research Guidelines for Human-AI Interaction

The research identifies 18 principles, including these context-relevant ones:

Initially (System Introduction):

- Make clear what the AI can do
- Make clear how well the AI can do what it can do
- Show contextually relevant information

During Interaction:

- Match relevant social norms
- Support efficient correction
- Remember recent interactions

Over Time:

- Learn from user behavior
- Update and adapt cautiously
- Convey consequences of AI actions

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Why Prompt Engineering Matters

With proper model selection and context established, the quality of your collaboration depends on how effectively you communicate with AI. Research demonstrates significant impact:

ACL 2022 Research:

- Well-designed prompts improve task performance by **20-50%**
- **Context-aware prompts** show **30% better accuracy** than generic ones
- **Iterative prompt refinement** yields continued improvement over time
- **Team-specific prompt libraries** reduce learning curves for new team members

Prompt Engineering Aligns with Scrum Values

Effective prompt engineering embodies Scrum values:

- **Focus:** Clear, specific prompts maintain attention on Sprint Goal
- **Commitment:** Well-crafted requests support achievement of objectives
- **Openness:** Transparent prompts create transparent responses
- **Respect:** Thoughtful communication respects AI as team member
- **Courage:** Iterative refinement shows courage to improve

The Three Principles of Effective Prompts

1. Framing Problems with Focus and Commitment
2. Defining Clear Expectations
3. Iterative Collaboration and Adaptation

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The Three Principles of Effective Prompts

1. Framing Problems with Focus

Teams that commit to achieving goals maintain focus on work that makes best progress. Apply this same focus when engaging AI.

2. Defining Clear Expectations

Just as you would with team members, clearly communicate what constitutes a complete response.

3. Iterative Collaboration and Adaptation

Effective teams employ iterative approaches. Treat AI interactions as collaborative conversations, not single transactions.

The User Story adapted for AI Prompting:

AS A [role on the team]
I NEED [AI to perform a specific task]
SO THAT [specific outcome that advances team objective]
GIVEN [available context and constraints]
WHEN [AI receives this information]
THEN [AI should deliver specific output]

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Principle 1

1. Framing Problems with Focus

Teams that commit to achieving goals maintain focus on work that makes best progress. Apply this same focus when engaging AI.

Strong Prompt (Focused):

"Our B2B dashboard users spend an average of 3 minutes per session, but successful customers in similar products average 8 minutes.
Given our current feature set [features listed] and recent user research findings [attached],
what specific engagement strategies should we test next that align with our Product Goal of 'helping teams make data-driven decisions faster'?"

Why it works:

- Specific current state
- Connects to Product Goal
- Provides relevant context (features, research)
- Asks for specific, testable strategies
- Focused on "next" (Sprint-appropriate timeframe)

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Principles 2 & 3

2. Defining Clear Expectations

Just as you would with team members, clearly communicate what constitutes a complete response.

Strong Prompt (Clear expectations):

"Analyze these user research findings and provide:

1. 3 key themes supported by specific user quotes
2. How each theme relates to our Product Goal
3. Three specific user story ideas
4. Assumptions requiring validation and how to test them”

3. Iterative Collaboration and Adaptation

Effective teams employ iterative approaches. Treat AI interactions as collaborative conversations, not single transactions.

Benefits of Iterative Approach:

- Team maintains control and direction
- Catches misunderstandings early
- Builds on what works
- Mirrors Scrum's empirical approach (inspect and adapt)
- Creates learning for both team and AI

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Prompt Patterns for Scrum

Backlog Refinement:

"Given our Product Goal '[goal]' and this stakeholder need '[need]', create a user story following our Definition of Ready:

- Clear user/stakeholder and benefit
- Acceptance criteria (Given/When/Then format)
- Size estimate context (reference similar past stories)
- Dependencies and risks flagged
- Questions needing Product Owner clarification"

Sprint Planning:

"We're planning Sprint [number] with goal '[goal]'. Given:

- Available capacity: [story points or days]

- Must include: [dependencies from previous Sprint]

- Product Backlog top items: [list]

Suggest:

1. Which items best fit Sprint Goal and capacity
2. Potential risks and mitigation approaches
3. Questions to discuss during Planning
4. Success criteria for the Sprint"

Sprint Review:

"Summarize our Sprint [number] outcomes for stakeholder review:

Completed: [list of items]

Not completed: [list with reasons]

Key learnings: [sprint data and observations]

Create:

1. Executive summary (3-4 sentences)
2. Demonstration flow that tells coherent story
3. Stakeholder questions we should anticipate
4. Data visualizations of Sprint progress"

Supporting Team Autonomy

Scrum Teams are self-managing. Ensure AI collaboration supports rather than undermines this.

Poor Prompt (Undermines autonomy):

"Tell me what our team should do about [problem]."

Strong Prompt (Supports autonomy):

"Our team is discussing [problem]. Provide:

- Different approaches to consider with pros and cons of each

- Questions we should consider in our decision

Our team will decide which approach fits our context best."

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The Empirical Approach to AI Governance

Scrum's three pillars apply directly to AI management:

1. **Transparency:** AI capabilities, limitations, and performance must be visible
2. **Inspection:** Regular evaluation of AI contributions against goals
3. **Adaptation:** Adjust AI integration based on observed outcomes

Establishing Evaluation Criteria

Define specific, observable metrics aligned with your team's values and objectives.

McKinsey's Three-Tier Framework:

Tier 1 - Activity Metrics (Immediate feedback) ~ 2-3 Sprints

- Time saved on specific tasks
- Number of AI interactions per Sprint
- AI usage frequency by team member
- Task completion rates with AI assistance

Tier 2 - Performance Metrics (Sprint-level impact) ~ 4-6 Sprints

- Quality improvements in AI-assisted work
- Speed improvements in decision-making
- Error reduction in routine tasks
- Team satisfaction with AI collaboration

Tier 3 - Business Value Metrics (Product-level outcomes) ~12-24 Sprints

- Product development cycle time reduction
- Customer satisfaction improvements
- Revenue impact from AI-enhanced decisions
- Product Goal achievement acceleration

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Red Flags - Immediate Action

1. Consistent Generic Responses

- Despite adequate context, AI provides surface-level advice
- Outputs could apply to any product, not your specific situation
- Team stops using AI because it doesn't add value

2. Recommendations Conflict with Strategy

- AI suggests approaches that contradict Product Goal
- Outputs ignore key constraints or requirements
- Team spends more time correcting AI than AI saves

3. Technical Limitations Block Workflow

- AI can't integrate with essential tools
- Response times slow team momentum
- Capability gaps prevent critical tasks

4. Team Satisfaction Declining

- Team members avoid using AI
- Frustration voiced in Retrospectives
- AI seen as burden rather than asset

Yellow Flags - Monitor & Discuss

1. Uneven Adoption

- Some team members use AI heavily, others avoid it
- Inconsistent quality across team's AI interactions
- Knowledge silos forming around AI usage

2. Dependency Concerns

- Team can't complete work without AI
- Professional skills atrophying
- Loss of critical thinking or creativity

3. Diminishing Returns

- Initial productivity gains plateau
- AI value not growing with team experience
- Same benefits, no continuous improvement

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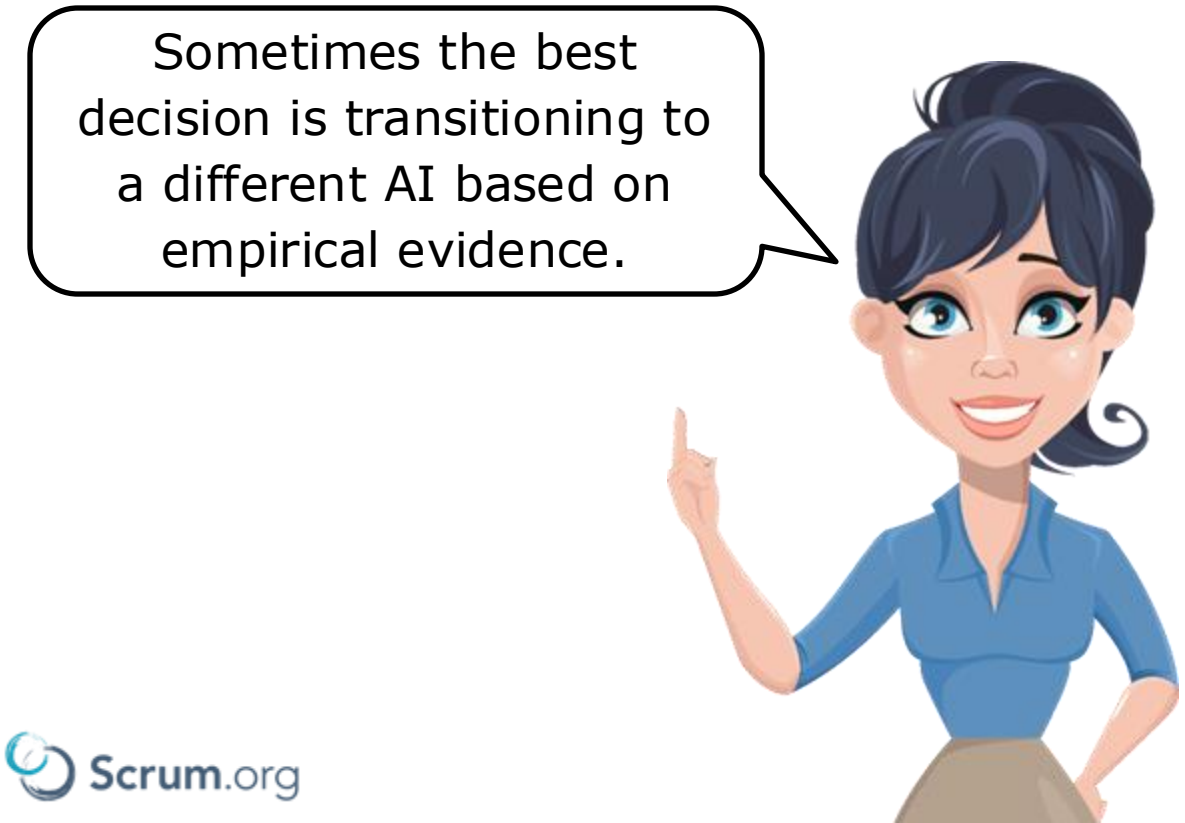
Continuous Improvement Cycle:

1. **Inspect:** Review AI performance each Sprint
2. **Adapt:** Update context, prompts, or approach based on learning
3. **Document:** Capture what works in team library
4. **Share:** Ensure all team members benefit from improvements



Scrum Values

Commitment Questions:

- Does AI help us meet Sprint Goals more consistently?
- Does AI contribution strengthen or weaken our commitments?

Focus Questions:

- Does AI keep us focused on Product Goal?
- Does AI help eliminate non-essential work?

Openness Questions:

- Do we openly discuss AI performance in Retrospectives?
- Can we honestly share when AI isn't working?

Respect Questions:

- Are we respecting each other's professional judgment alongside AI input?
- Does AI support rather than undermine team expertise?

Courage Questions:

- Are we brave enough to change AI approach when needed?
- Do we have courage to reject AI recommendations when appropriate?

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Summary: The AI Teammate Framework

This webinar introduced a four-step framework that applies proven team management principles to AI integration:

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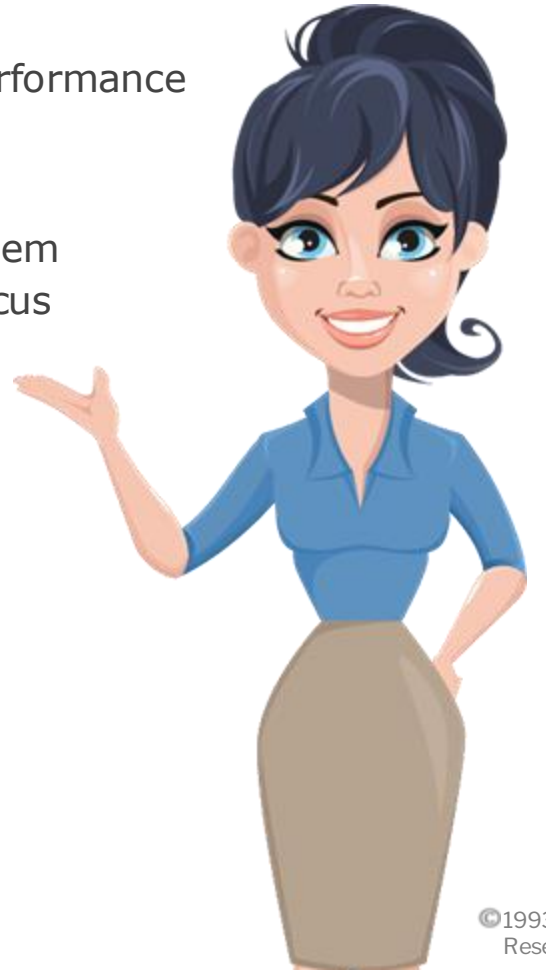

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Integration with Your Current Practice

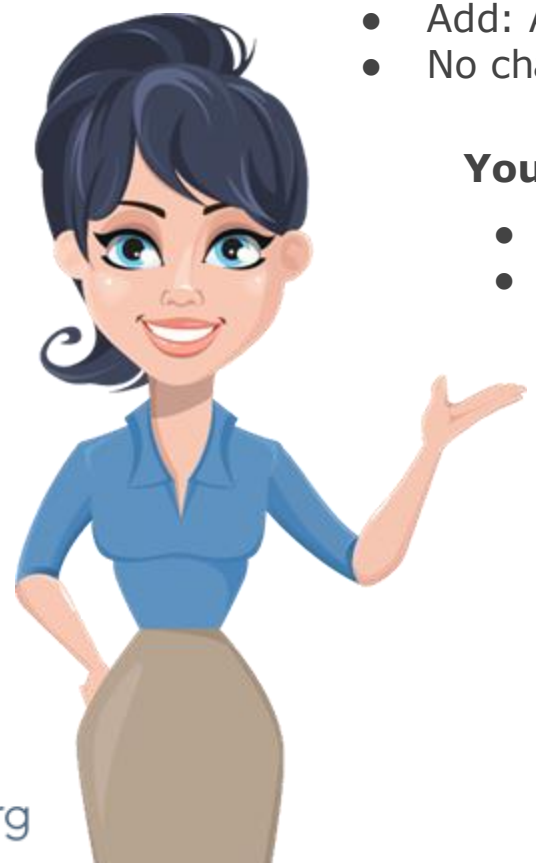
The AI Teammate Framework doesn't replace existing Scrum practices; it should enhance them.

Your Sprint Planning:

- Add: 5 minutes to identify where AI could support Sprint work
- No change to: Sprint Goal creation, commitment process, team collaboration

Your Backlog Refinement:

- Add: AI-generated draft stories as a starting point
- No change to: Team discussion, acceptance criteria refinement, estimation



Your Sprint Retrospective:

- Add: Periodic AI integration effectiveness check
- No change to: Team introspection, improvement identification, adaptation

Your Sprint Review:

- Add: AI-assisted data visualization and summary
- No change to: Demonstration, stakeholder engagement, adaptation decisions

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Sample Success Indicators

You'll know your AI integration is successful when…

Process Indicators:

- Sprint Goals met more consistently
- Backlog Refinement is more efficient
- Faster decision-making with better information

Team Indicators:

- All team members comfortable using AI for appropriate tasks
- Team makes decisions based on own judgment + AI input
- Professional skills developing (not atrophying)

Product Indicators:

- Product Goal progress on/ahead of schedule
- Stakeholder satisfaction maintained or improved
- Team sustainable pace maintained

Values Indicators:

- Commitment: Team meets commitments reliably
- Focus: Sprint work aligned with goals
- Openness: Transparent AI usage and limitations
- Respect: Team members' expertise valued alongside AI
- Courage: Team tackles complex problems

But be on the lookout for…

Pitfall 1: Treating AI as Authority Instead of a Tool

Pitfall 2: Inadequate Context Leading to Generic Responses

Pitfall 3: Context Becoming Stale

Pitfall 4: Neglecting Governance Leading to Drift

Pitfall 5: Over-Reliance Creating Dependency

Pitfall 6: Ignoring Values Impact

Pitfall 7: One Team Member Becomes "AI Expert" Bottleneck

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Your Next Steps

To begin implementing the AI Teammate Framework:

Immediate (This Week):

1. If no AI yet: Begin Step 1 (Model Management)
2. If AI already in use: Assess current state using governance framework
3. Share framework with your team (Product Owner, Scrum Master agreement)
4. Schedule time in upcoming Sprint Planning or Refinement to discuss

Short-term (Next Sprint):

1. Complete whichever step is appropriate for your current state
2. Start gathering baseline metrics if beginning AI integration
3. Document your starting point (context, practices, metrics)
4. Set up measurement approach for tracking progress
5. Create initial prompt library or improve existing one

Medium-term (Next Quarter):

1. Complete all four steps of the framework
2. Conduct first comprehensive governance review
3. Refine practices based on learning
4. Build team capability and shared knowledge
5. Demonstrate value through metrics and outcomes

Long-term (Ongoing):

1. Maintain continuous improvement
2. Update context as product evolves
3. Regular governance reviews
4. Stay informed about AI capabilities
5. Share learnings

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Q&A

Sources & links

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- WEF — Future of Jobs Report 2025 (skills to 2030) — PDF
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