

Think you might like to be a Certified Scrum Trainer (CST)?

Read this

By Tim Korson

Background

It's not an easy process. It's not intended to be.

It is not a meticulously defined process. It's not intended to be - at least that is the personal conclusion I have drawn after talking to a number of CSTs that have participated in the trainer approval process.

It is an expensive process. It is intended to be. The yearly fee for being a CST is \$7,500. The co-training process will likely cost you several thousand more.

I am writing this on the plane on the way home from the Scrum Gathering in London. During the Gathering, Vernon Stinebaker and I co-hosted a session on "Becoming a CST." The purpose of this article is to share the information that I have gleaned about the CST approval process from that session as well as from numerous additional personal discussions with current CSTs. The observations and conclusions in this article are my own. I believe them to be valid as they are based on my experience as a CST applicant and my personal interactions with members of the Scrum Alliance leadership, but they are colored by my own memory and perceptions. My hope is that the information I have collected will be of value to other CST candidates and those contemplating starting the process.

The official outline of the process and CST application materials can be found on the Scrum Alliance website. The problem is that for most of us mere mortals, the actual CST approval criteria are stricter than a surface interpretation of the officially published ones. For example, the official statement on the Scrum Alliance website says: "Experience co-training is highly recommended." In fact, according to numerous members of the trainer approval group¹, for the typical applicant, experience co-training is absolutely critical to getting approved. From what I can extrapolate, this discrepancy between the official criteria and the actual criteria arises from two sources.

The first is an attempt to have flexible criteria that allow the committee to accommodate edge cases such as the approval of a well-known, senior member of the Scrum community, or the approval of a trainer facing geographical or language challenges to co-training. For example, someone trying to find co-trainers in Africa, Asia, South America, or other areas where trainer density is low would be given more flexibility than someone in an area where there is ready access to CSTs².

¹ I use "trainer approval group" to refer to anyone who has participated in the current version of the trainer approval process.

² Comments by Vernon Stinebaker on an earlier draft of this article.

The second arises from the differences between the process for creating the CST approval criteria and the actual approval process for CST applicants. The official CST approval criteria and process represents in a sense, a least common denominator consensus, as all the criteria included in the official process need the approval of a group of Scrum Alliance leaders. Some members of the Scrum Alliance leadership favor less stringent criteria for admitting new CSTs. Many existing CSTs favor very high standards for new CSTs. The official policy reflects somewhat of a compromise between the interested parties.

However, the actual approval process is administered entirely by current CSTs and requires 4/5 votes for the initial paper phase and 5/7 votes for the final phase. Thus, in the worst case, the candidate must get the approval of up to 9 separate existing CSTs. Given individual variations among members of the trainer approval group, some CST candidates have faced a stricter approval committee than others. A candidate guided only by the official criteria may not be prepared for a more stringent committee and thus may fail this final stage of the approval process. A similar phenomenon has been noted by the program lead for the Certified Scrum Coaching (CSC) Program³.

As noted above, the official CST approval criteria are published on the Scrum Alliance website. Minimally meeting the published requirements is not very safe. To maximize their chance of approval, the candidate should go beyond the minimum stated requirements. I have copied the official CST approval criteria below, and annotated them with comments in italics to reflect what I have gathered to be the actual CST approval criteria for the typical candidate. Following my annotations, I have included some personal reflections about the value I have found in going through this process.

In summary, most of the members of the trainer approval group that I have interviewed have been very helpful and are committed to making the CST approval process reasonable and fair. In spite of individual opinions, most trainer approval decisions are reached by consensus. Never-the-less, I believe that it is very wise for an applicant to develop a strong application that meets the annotated suggestions below. As Nigel Baker says:⁴ "Aim high - it makes certifying you much easier."

Annotated CST Approval Criteria

A CST is an ambassador of Scrum. He or she will:

- Have a solid understanding of the Scrum framework, a deep understanding of the principles and values that are the foundations of Scrum, and a clarity on what belongs to Scrum and what is an extension or complement;
On the "Become a CST" website⁵ we are compiling a minimum reading list of books and articles. All CST applicants should be able to discuss this literature in depth.
- Have extensive experience of implementing and/or coaching Scrum inside organizations;
Remove the "and/or." Many members of the CST approval community do not recognize coaching (even extensive coaching) as sufficient. You are not likely to become certified until you have substantial experience as a pig. At minimum, you must have worked as a

³ Applying to Become a CSC, by Pete Behren, published on the Scrum Alliance website.

⁴ Private email dated Fri 10/21/2011

⁵ <https://sites.google.com/site/becomeacst/>

- ScrumMaster; extra points if you have also worked as a product owner or member of the development team.*
- **Be active in the wider Scrum community through actual and virtual interaction with other Scrum and Agile thinkers and practitioners;**
 - If a number of persons in the approval committee have never heard of you before they get your application packet, you are less likely to get approved. At a minimum you must*
 - *attend both global and local gatherings*
 - *don't just attend – participate, submit proposals and organize open space meetings.*
 - *actively seek out current CSTs that are also attending and introduce yourself to them.*
 - *be part of the leadership of any groups local to you.*
 - *participate frequently in Scrum forums and discussion groups*
 - *speak on Scrum at as many conferences and groups as possible both inside and outside of the Scrum community.*
 - *write articles on some aspect of Scrum.*
 - **Have training experience beyond just Scrum, be willing to explore new ways of working and be committed to continuous improvement.**
 - *We are talking substantial historical evidence that you are a good speaker and can handle audiences.*
 - *You must be able to articulate how you have improved your training style based on actual student feedback.*
 - *You must be able to demonstrate that you are not just a master of Scrum, but also a master trainer.*
 - *You must continuously improve your professional training skills by reading books on training, participating in training seminars, co-teaching, and experimenting with new training techniques. If the committee finds you to be simply a mediocre lecturer and not a master trainer, you will have a hard time getting approved.*

The CST applicant will also recognize that

- **Basic background information, course materials, exercises, etc. are required**
 - *Don't forget to include references substantiating your expertise as a trainer.*
 - *The exercises are as important as the PowerPoint material. Don't just describe the exercise; explain the learning objectives for the exercise.*
- **Experience co-training is highly recommended**
 - *Co-training is absolutely required. Five co-training sessions is recommended. The more over the minimum, the stronger your application.*
 - *Be prepared to articulate what you learned while co-training.*
 - *Don't neglect a co-training opportunity just because it won't result in a reference. Even if you can't interact with a CST enough to get a reference, you can still learn by co-training with them, and increasing your number of co-trainings, strengthens your application.*
- **At least 5 references from current CSTs is highly recommended**
 - *Five references is a minimum. Hard-to-get references from leaders in the Scrum community are counted more heavily than references that are easy to get.*
 - *References from those who have a vested interest in your success count less than other references*

- *References from those with whom you have co-trained count a lot.*
- *Don't forget to include additional references from clients.*
- *Don't forget you are applying to become a Scrum TRAINER. References that can speak to your training ability are also valuable.*

Annotated CST approval process

- **Pass an initial paper review by a peer review committee**
 - *Put thoughtful work into your paper application. Make it easy for the reviewers to find everything they are seeking. It may all be in your attached resume, but copy out the relevant Scrum experience, presentations, and articles and highlight them in the appropriate section of your application. It should be crystal clear from your application that you meet all of the criteria in the previous section.*
- **Face to face interview for those who pass initial review**
 - *There will be 2 parts to this interview. Be prepared for both. The first part is a relatively traditional interview. The committee may ask you relatively standard interview type questions, so if you haven't interviewed recently, then you will need to prepare by practicing with a professional colleague (get one of the CST's you co-train with to mock interview you), and re-read the standard interviewing literature to prepare yourself for traditional but tricky interview questions. Specifically you should be prepared to articulate why you want to be a CST.*
 - *The second part of the interview will be a 30 minute sample training session. The committee will choose for you one topic out of a list of predefined topics. You will have to teach the topic on the fly without any PowerPoint slides. You can use a flipchart and any other props you have brought with you. During this session, be prepared for the committee members to play the disruptive, dysfunctional, antagonistic student game to see how you respond to such situations. You must not only demonstrate mastery of the subject you are teaching, but mastery of delivery and of the classroom. One piece of advice I was given by a current CST seems very wise to me: avoid the extremes of teaching styles during this part of the interview. If you simply lecture, you will be marked down. On the other hand, many who have tried a total "back of the room" approach have not done well at all. Also, total "back of the room" doesn't give the committee the chance to see you in action in the front of the room, where all instructors typically "perform" at least part of the time. So the recommended approach will be to do a basically front of the room approach, but make it a very interactive lecture, with a good mix of tried and true mini-exercises thrown in to illustrate your rounded student-centered approach.*

Advice Summary

From what I have been able to gather, in addition to seeing that you have had substantial experience as a ScrumMaster, the committee is looking for a minimum of four things.

1. Are you a recognized, contributing, established member of the Scrum community?
2. Is your knowledge of Scrum and all of the surrounding and supporting information impeccable?
3. Is your passion and commitment to Scrum and being a Scrum ambassador balanced and unquestionable?
4. Are you a great trainer?

The evaluation process is deliberately meant to be a very human one. The perfect paper candidate could still fail the human interview, because there are so many intangibles that can only be ascertained face to face. From each of the above categories, I'll give an example that I have heard from some member of the trainer approval group.

1. The committee is looking for signs that you will continue to be a contributing member of the Scrum community after you become a CST. Unfortunately some CSTs disappear from the active community once they become CSTs. The committee can only evaluate the probability of this occurring by reading between the lines, watching your body language and facial expressions, when asked revealing questions.
2. If asked to discuss the issue of a prioritized backlog versus an ordered backlog, and your first facial expression is one of being puzzled because you are not even aware that Jeff and Ken have published a new version of the Scrum Guide, you are in trouble even if, based on your knowledge of the English definition of the words, you recover and talk your way through it.
3. When asked about the purpose behind each element of the Scrum framework, does it become apparent that you give the correct answers but that your attitude reveals that Scrum teams really should be free to modify the basic framework as needed? You might verbally profess the need for a daily scrum, but your body language might cast doubt on your commitment to this. On the other hand do you come across as a Scrum extremist that does not recognize the contribution of other approaches?
4. How comfortable are you in front of a class? Do difficult questions throw you? Do you have passion for your subject? The committee will be observing much more than just the words you speak. Unfortunately not all great Scrum Masters make great trainers. CSTs have to excel at both.

The CST application process hopes to prevent end game failure by requiring you to submit five recommendations along with your application. While not likely, it is, however, possible to get the required recommendations and still not make it through the final interview. It is my hope that this document will help applicants to be more realistically prepared for the trainer approval committee.

In addition to this document, I have set up both a Google group⁶ and a Google website⁷ specifically dedicated to supporting CST applicants. I invite all CST applicants to join. A number of past training approval committee members belong to the group and are willing to help mentor you through the CST approval process. I encourage all past TAC members to join.

Even if you don't join the group, you may be interested in browsing the website which contains:

- the most recent version of this article
- a recommended reading list
- comments by TAC members
- co-training criteria by a number of CSTs

⁶ <http://groups.google.com/group/becomeacst?hl=en>

⁷ <https://sites.google.com/site/becomeacst/>

Personal observations and conclusions

I have personally found the process to be very valuable. In spite of my 30+ years as a professional trainer and consultant, I have learned something valuable from each of my co-training experiences. Sometimes it was a training technique, sometimes a new game; sometimes reconciling a contradiction between two CSTs forced me to think Scrum through to a deeper level than I had previously done.

The core of the process is really based on mentoring. Going through the process has resulted in having a number of close CST colleagues who will continue to stimulate my professional growth and support me when I need the energy and intellectual boost that being part of the Scrum community can provide.

I, like every other Scrum professional I know, am hyper-busy. I have always enjoyed professional community involvement, but the CST application process has resulted in my even more active involvement in the Scrum community than would have otherwise been likely given my hyper-busy schedule. This involvement has, I hope, been beneficial to the community at large, but has definitely been beneficial to me personally. The Scrum community is full of stimulating and challenging ideas. These challenges and ideas keep me growing both personally and professionally. It is also a lot of fun to have a good roaring healthy debate with a respected colleague.

I thank everyone who has encouraged me and given me advice. I especially thank those that have allowed me to co-train with them and have become my mentors.

See you all at the next Scrum Gathering!