Agile Meetings: Facilitating High Performance Task-Oriented Meetings

David Chilcott
Outformations, Inc.
Agenda

- **Setup & Context**
- Agile Meetings? What the heck?
- Agile Meeting Structure
- Exercise: Meeting Business Value
- Agile Meeting Process/Practices
- Key Points Review
- Closing/Evaluation
Setup & Context

• Meeting Questions
• Why do we care?
• Introductions
• Housekeeping
• Desired Outcomes
• Questions/Comments/Concerns?
Setup & Context

Questions…

• How many of you here enjoy your team meetings?
• How many think that most of the meetings you attend are a waste of time?
• How many are able to actually get work done in meetings instead of just talking about the work?
• How many of you leave your meetings feeling more energized and enthusiastic?
Most of the interesting work now requires a team.
Most of us have the feeling that the meetings that we attend could be improved.
Most of us could stand to improve our own meeting skills and knowledge.
Ineffective meetings are expensive and demoralizing.
About me - David Chilcott

- Developer, Coach, Team Lead, Business Analyst/Technical Architect

- Background: Diverse -- Multiple Careers
  - Founder and president of Outformations, Inc.
  - Agile Business Consulting/Training/Coaching
  - Agile Enterprise JumpStart
  - Custom Business Application Design/Development
  - Training in Group Dynamics, Facilitation, NVC
  - Certified ScrumMaster in 2006

- Organizational Affiliations
  - Founder of the Bay Area Agile Project Leadership Network
  - Former president, Bay Area Association of Database Developers

- Husband, Step-father, Grand-father
  - Active in healing, diversity, & social justice work
Check-In: Who are We?

- Name
- Where you work
- How many meetings do you participate in each week?
Setup & Context

Housekeeping

- Presentation materials available online
- Participate! Questions!
- Cell phones on stun
- Instructor will facilitate:
  - quell the loquacious
  - encourage the quiet

- Remember: different people have different learning styles...
Setup & Context

Context & Expectations:

- Survey/Overview/View from 60,000 feet
- Difficult challenge
  - We'll be covering a LOT of Material
- It is deliberately ambitious
- Be aware that you may feel frustrated or confused
- Feel free to ask questions
Setup & Context

**Desired Outcomes:**

By the end of this session you will have:

- A better understanding of what Agile Meetings are and how they can help you improve your business or teams effectiveness.
- A better understanding of the range and depth of **Agile Meeting Practices** so that you can continue learning about it.
Setup & Context

Questions/Comments/Concerns?

- Any questions?
- What’s puzzling you so far?
Agenda

✓ Setup & Context
• **Agile Meetings? What the heck?**
• Agile Meeting Structure
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Agile Meetings? What the heck?

- Agile Meetings and Agile Work
- Business Case
- Agile Meeting Mental Models
- Questions/Comments/Concerns?
How could meetings be like Scrum/Agile?

- Meeting = Iteration/Sprint
- Agenda = Product Backlog
- Agenda Item = Feature or Function or Story or Task
- Desired Outcome = User Story
- Agenda Item Owner = Product Owner
- Shared Display = Big Public Display of Information
- Meeting Participants = Promiscuous Pairing
- Meeting Evaluation = Retrospective
Agile Meetings? What the heck?

Business Case for Agile Meetings

- Increase Meeting Effectiveness/ROI
  - Team Learning
  - Problem-Solving
  - Relationship Building
  - Group and Individual Skill Building

- Improve the Delivery of Value

- Reduce Meeting Waste (Lean Principles)
  - Personal/Personnel Time
  - Opportunity Cost
  - Organizational Damage

- Reduce Meeting Costs
**Agile Meetings? What the heck?**

## Reduce Meeting Costs

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Average hourly rate of your group members</td>
<td>$100/hr</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average number of members per meeting</td>
<td>5 people</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Typical meetings duration</td>
<td>2 hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meetings you attend each week</td>
<td>5/week</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>$8.33/min</strong></td>
<td><strong>$500/hr</strong></td>
<td><strong>$5000/week</strong></td>
<td><strong>$250,000/year</strong></td>
</tr>
</tbody>
</table>

Assume Agile Meetings improve our performance by:

- **10 %** Saves $25,000/year
- **20 %** Saves $50,000/year
- **30 %** Saves $75,000/year
- **40 %** Saves $100,000/year
- **50 %** Saves $125,000/year
Agile Meetings? What the heck?

Agile Meeting Mental Models

- Dimensions of Success
  - Balance Results, Process, and Relationship
- Shared Responsibility
  - Facilitated Self-Organization
- Problem Solving
  - Team Learning
- Context, not Control
  - From Netflix
Agile Meetings? What the heck?

Dimensions of Success

Accomplishment of the task or goal

RESULTS

PROCESS
Method or approach for doing the work

RELATIONSHIP
Rapport between team members (team spirit)

Balance Results, Process, and Relationship
Agile Meetings? What the heck?

Shared Responsibility

Collaborative Attitude

Shared Responsibility for Success

Facilitative Behaviors

Strategic Thinking

Facilitated Self-Organization
Agile Meetings? What the heck?

Problem Solving Spaces

Distinguish between Understanding and Agreement

Problem Space

Solution Space

Implementation Space
Agile Meetings? What the heck?

Context, not Control
Provide the insight and understanding to enable sound decisions

Context
• Strategy
• Metrics
• Assumptions
• Objectives
• Clearly-defined roles
• Knowledge of the stakes
• Transparency around decision-making

Control
• Top-down decision-making
• Management approval
• Committees
• Planning and process valued more than results

(from Netflix Freedom & Responsibility Culture)
Agile Meetings? What the heck?

Questions/Comments/Concerns?

• Any questions?

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Setup & Context
✓ Agile Meetings? What the heck?
  • **Agile Meeting Structure**
  • Exercise: Meeting Business Value
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  • Closing/Evaluation
Agile Meeting Structure

• Context: **TASK-ORIENTED** Meetings
• Meeting Structure Overview
• Meeting Roles & Responsibilities
• Questions/Comments/Concerns?
Agile Meeting Structure

TASK-ORIENTED Meeting

- Goals & Objectives
- Issues, Concerns, Problems
- People
- Resources
Agile Meeting Structure

Agile Meetings have:

• **Purpose:**
  - Why is this meeting being held (e.g., Sharing information, solving problems, resolving differences)?

• **Stakeholders:**
  - Who are the people or groups affected by the potential decisions in this meeting? What would be the "win" for each?

• **Participants:**
  - Who's in the room? Who's **NOT** in the room? Why or Why Not?

• **Goals & Objectives:**
  - What are the specific desired end results or specific deliverables for **THIS** meeting?
Agile Meeting Structure

Agile Meetings have:

• **Structure:**
  - Implicit or explicit structure
  - Explicit with agreement tends to work better

• **Agenda:**
  - What topics/issues need to be addressed to reach the Goals and Objective(s)?
  - All else being the same do the highest value items 1<sup>st</sup>
  - **Agenda Items have:**
    - an order (planned and/or actual)
    - a Desired Outcome
    - an Owner or Owners
    - criterion for determining a successful outcome.
    - a Time Limit
Agile Meeting Structure

Meeting Structure Overview

- **Varieties**: Pre-Meeting
- **5 – 10 min**: Meeting Startup
- **50 – 100 min**: Meeting
- **2 – 5 min**: Meeting Closing
- **Varieties**: Post Meeting

*OUTFORMATIONS*
## Agile Meeting Structure

### Pre-Meeting Overview

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Room Arrangement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context Assessment</td>
<td>Decision-Making Method</td>
</tr>
<tr>
<td>Stakeholder Analysis</td>
<td>Detailed Agenda</td>
</tr>
<tr>
<td>Desired Outcomes</td>
<td>Meeting Functions</td>
</tr>
<tr>
<td>Topics/Issues</td>
<td>Meeting Supplies</td>
</tr>
<tr>
<td>Attendees &amp; Roles</td>
<td></td>
</tr>
</tbody>
</table>
Agile Meeting Structure

Meeting Startup Overview

- Check-In:
- Housekeeping:
- Establish the "Rules of Engagement"
- Review Last Meeting Items:
- Review Agenda:
- Review Meeting Desired Outcomes:
- Setup Parking Lot:
- Review Pressing Risks/Issues/Concerns/Opportunities:
Agenda Item Types have Types

- **Report Back/Info Sharing**
  - NOT a Conversation - One way information flow

- **Idea Capture**
  - Conversations for Possibility
  - Brainstorming is a good example, the goal is to maximize creativity - to generate ideas not make decisions

- **Problem Solving**
  - Conversations for Opportunity
  - The goal is not to reach a final decision but to narrow down a field of ideas or options. You gather info, analyze, and generate required next steps

- **Decisions to be made**
  - Conversations for Agreement/Decision
  - The goal is to decide and/or to commit.

Agenda Item Types **CAN** change. Notice when they do!
Agile Meeting Structure

Meeting Agenda Overview (continued)

✓ Agenda Items have Types
• Agenda Items have Owners
• Agenda Item Owner defines "Done"
  ✷ Criteria for success
  ✷ Desired Outcome from THIS meeting
  ✷ By the end of this meeting, we will have...
    • A list of _________________ ... so that we can _________________
    • A plan for _________________ ... so that we can _________________
    • An awareness of __________... so that we can _________________
    • An understanding of _______... so that we can _________________
    • A decision on ____________ ... so that we can _______________
    • An agreement on __________ ... so that we can _______________

Notice how similar these are to User Stories!
Agile Meeting Structure

Meeting Closing Overview

- Review Next Steps/Action Items
- Setup or Confirm Next Meeting
- Perform Meeting Evaluation
  - What did we do well?
  - What could we do differently or better
Agile Meeting Structure

Post-Meeting Overview

- Meeting Take-down
- Send out meeting notes
- Follow-up on any other items
Agile Meeting Structure

Meeting Roles & Responsibilities

- **Facilitator** - Guides meeting process
- **Recorder/Scribe** - Keeps group memory
- **Time-Keeper** - Helps group keep time agreements
- **Spokesperson** - Represents group to others
- **"Vibes watcher"** - Monitors how people are feeling
- **Agenda Item Owner** - Defines Desired Outcome and "Just Good Enough"
- **Subject Matter Expert (SME)** - Provides information and expert advice to group
- **Meeting Participant** - Shares responsibility for meeting success
Agile Meeting Structure

Questions/Comments/Concerns?

• Any questions?

• What’s puzzling you so far?
Agenda

✓ Setup & Context
✓ Agile Meetings? What the heck?
✓ Agile Meeting Structure
• **Exercise: Meeting Business Value**
• Agile Meeting Process/Practices
• Key Points Review
• Closing/Evaluation
Exercise – 35 Min

Meeting Business Value

How to measure Meeting Business Value?

• 5 – Setup and instructions
  • Self-Organize into groups of 4 or 5
  • Make meeting roles explicit
  • At least: Facilitator – Time-keeper – Spokesperson

• 10 – Brainstorm ideas onto sticky notes
  • Group and Prioritize them

• 10 – Report back to the group

• 8 – Debrief/Evaluation

• 2 – Collect and Return sticky notes
Agenda

✓ Setup & Context
✓ Agile Meetings? What the heck?
✓ Agile Meeting Structure
✓ Exercise: Meeting Business Value

• **Agile Meeting Process/Practices**
• Key Points Review
• Closing/Evaluation
Agile Meeting Process/Practices

- Have an Agenda - send it out the day before if you can
- Have a Shared Display - whiteboard, flip-chart, projector, online meeting
- Distinguish between Meeting Content and Meeting Process
- Flexible and Fluid Roles/Responsibilities
- Rotate Roles Explicitly
- Active Facilitation
- Consult with Agenda Item Owner when starting each new Agenda Item
Agile Meeting Process/Practices

• Practice "Just Good Enough"
• Timebox EVERYTHING!
• Start meetings on time
  • Don't penalize the people who made the effort to be on time
• End meetings on time
  • Like Sprints meetings should end on time - There is ALWAYS more to do than available attention
• Paraphrase to ensure Understanding - TDD of meetings
• Distinguish between Understanding and Agreement
• ALWAYS end with a Meeting Evaluation (Retrospective)
  • Especially the "How to..." towards action/solution
Agile Meeting Process/Practices

Questions/Comments/Concerns?

• Any questions?

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Agenda

✓ Setup & Context
✓ Agile Meetings? What the heck?
✓ Agile Meeting Structure
✓ Agile Meeting Process/Practices

• Key Points Review
• Closing/Evaluation
Key Points Review

• Clear Agenda/Process
  ◦ There is always a process - explicit works better!

• Clear and Flexible Roles/Responsibilities
  ◦ Members switch Roles/Responsibilities based on context/need

• Clear Desired Outcomes
  ◦ Agenda Item Owner decides what "Just Good Enough" means

• Good Time Management
  ◦ Time Boxing/Improves Estimates/Expectations/ “Velocity”

• Use Appropriate Tools
  ◦ Select the right process for the task at hand

• Meeting Evaluations
  ◦ Continuous Improvement through Self-Reflection
  ◦ Mini-Retrospectives for each meeting
Key Points Review

Questions/Comments/Concerns?

• Any questions?

• What’s puzzling you so far?
Agenda

✓ Setup & Context
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✓ Agile Meeting Structure
✓ Agile Meeting Process/Practices
✓ Key Points Review

• Closing/Evaluation
Closing/Evaluation

- Closing Comments
- Materials & Hand-outs
- Pointers to Additional Resources
- Plug for my October Training
  or ask me about an In-House Training
- Evaluation (+/<>)(Please fill out)
Most Important:
The central organizing principle: Incremental Self-Improvement.
Establish mechanism for incremental improvement focused on behaviors

• Find the balance between Process Skills and Content Learning
  - Meetings, like Sprints, require skills and practice
  - Expect the your team to get better over time with experience

What did you learn tonight?
A highlight or insight?
Closing/Evaluation

Meeting Resources:

Books:
- **Collaboration Explained**: Facilitation Skills for Software Project Leaders by Jean Tabaka
- **Facilitator’s Guide to Participatory Decision Making** – Sam Kaner
- **Extreme Facilitation: Guiding Groups Through Controversy and Complexity** by Susanne Ghais

Training:
- Outformations Agile Meeting Training - [http://www.outformations.com](http://www.outformations.com)

Meeting Templates: Available at [http://www.outformations.com](http://www.outformations.com)
- Presentation Notes
- MindMap Meeting Template
- Meeting Agenda Outline
- Facilitator and Facilities Checklists
Evaluation:

Please fill out the BayAPLN Event Feedback form

- What did we do well? What Worked?
- What could we do differently or better?
Thanks…

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