

Can't Travel?
Virtual Retrospectives can be
effective!

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I imagine....

Your manager has asked you to...

- Facilitate a session to gather key learnings...
- With a team who is geographically dispersed...
- Zero travel budget!

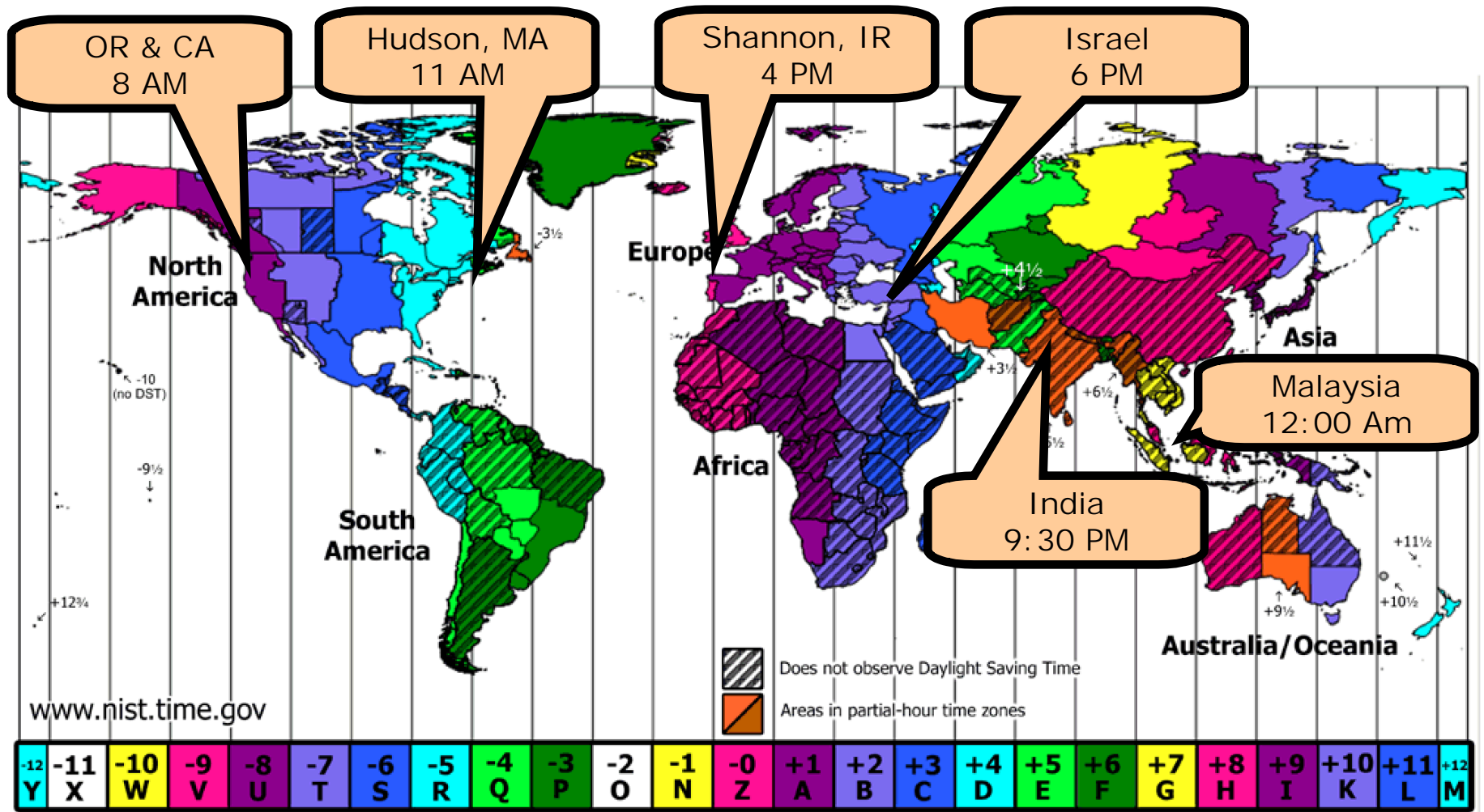
How would you proceed???

Purpose of a Retrospective

The focus is to increase the effectiveness of the team by:

- Sharing perspectives to understand what worked well in the project so we can reinforce it
- Identifying opportunities for improvement & lessons learned so we can improve this & subsequent projects
- Making specific recommendations for changes
- Discussing what the team wants to do differently
- Helping the team see ways to work together more efficiently

World Time Zones



http://www.thebusinessbay.com/maps/Time_Zone_map2_big.gif

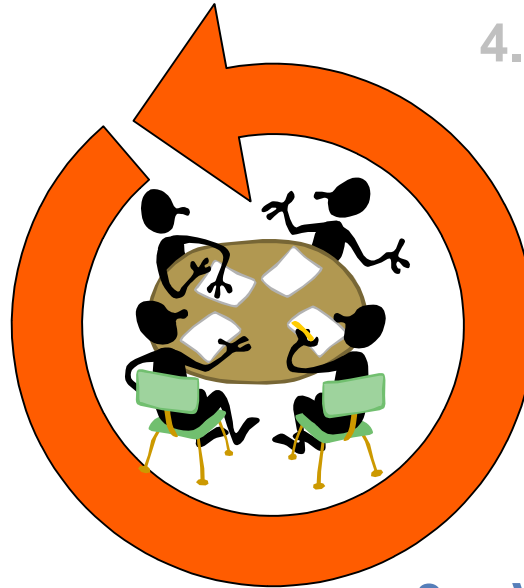
What are some of the challenges?

- **Time zone differences**
 - Difficult to find a convenient time for all
 - Resistance to bringing in a new process
- **Impossible to get the entire team face to face**
 - Cost prohibitive – ZERO travel budget
 - Time constraints, let's do this fast
- **Cultural differences**
 - US, Israel, India, Malaysia, other countries
 - Not wanting to air their dirty laundry
 - English as a second language

How did we do it?

1. Planning

- Plan the logistics
- Collect and organize project objective data
- Conduct Retrospective Survey
- Analyze survey data



2. Virtual Retrospective Meeting

- Review Survey Data
- “Harvest” the data for common themes
- Identify volunteers to create action plans

4. Close the Loop

- Close Action Plans
- Document key learnings
- Affect changes in current (if applicable) & future programs
- Update lifecycle framework as needed

3. Virtual Action Planning Meeting

- Sub-teams to write Action Plans
- Assign owners & execute Action Plans
- Communicate outcomes to management

Tailoring our approach

- Use an already established meeting
- Focus on a specific milestone
- Break into smaller sub-teams
- Use a neutral, skilled facilitator
- Travel isn't always necessary

Session 1: Agenda 7:30 – 9:30pm (Pacific Time)

When	What	Expected outcome
10 min	<ul style="list-style-type: none">• Introductions/ objectives & ground rules	Align on purpose of retrospective Enable an effective meeting
10 min	<ul style="list-style-type: none">• Quick Program Overview	Scope, value proposition & timeline
60 min	<ul style="list-style-type: none">• Review survey data to identify key messages from the survey questions	Break into smaller teams to synthesize raw data into key messages
30 min	<ul style="list-style-type: none">• Short report out presentation from each break out team	Identify recommended focus areas & common themes
10 min	<ul style="list-style-type: none">• Wrap up and set next steps	Discuss how the team will create the action plans outside of the meeting today



Session 2: Agenda 7:30 – 9:30pm (Pacific Time)

When	What	Expected outcome
20 min	<ul style="list-style-type: none">• Review key messages from session one	Align on purpose of this second meeting retrospective
50 min	<ul style="list-style-type: none">• 10 min: Instructions for Action Planning• 40 min: Work in smaller sub-teams	Write two action plans
40 min	<ul style="list-style-type: none">• Report out (each team has 15-20 min)	Share with broader audience to ensure we fill gaps and answer questions
10 min	<ul style="list-style-type: none">• Wrap up and set next steps	Share how the outcomes from today will be used

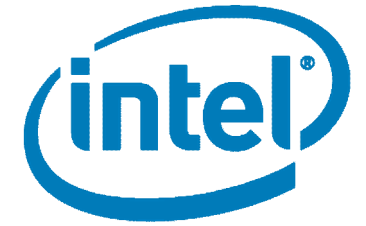


Things to think about...

- Start with a problem, not a solution
 - Problem: No more travel
 - Face-to-face meetings are a thing of the past
 - Collaboration software & telephone
 - More and more use of video conferencing
- Begin small & establish pull
 - Find a globally dispersed team willing to try something new
 - Ask who would benefit from their wisdom
- Tailor the solution as needed
 - One size does not fit all

Final Thoughts

- Focus on the current problems within the team or organization
- Start small, engage with a team who is open to trying something new
- Show results via a pilot implementation
- Meet with top leaders to share results and educate them on the benefits, then go for broad deployment



BACKUP

Organizational Learning Capability

Organizational Learning is the systematic and repeatable use of techniques for discovering, documenting, disseminating, and maintaining the accumulative knowledge of an organization

Organizational Learning Activities

Elicitation	Analysis & Validation	Specification	Dissemination	Management
<i>Gathering learnings from teams</i>	<i>Analyzing, discussing, and ensuring correctness of the learning</i>	<i>Documenting the key learnings from the Recommender into the database</i>	<i>Receiver committing to change & applying learnings to current or subsequent programs</i>	<i>Maintaining and tracking the results</i>
←Retrospective Practice→		←Organizational Learning deliverables→		

Key Point: OrgLearning and Retrospectives are related, but different

Retrospective is a practice that...

1. **Supports a positive and productive team environment**

- Identify and reinforce what is working
- Learn what needs to change or improve
- Collaborate to develop specific action plans

2. **Scalable to the complexity of the program and experience of team members**

- Occurs at ~3 strategic points across the program lifecycle
- Variety of process options adapt to the needs of the program

3. **Creates a constructive learning environment for feedback**

- It is led by a trained, objective facilitator
- Focus on developing action plans and tracking results

What Makes a Retrospective Different?

Common Review Practice	Retrospective
Conducted only at the end of the project.	Conducted at three (or more) strategic milestones during the program lifecycle
Not applicable to other projects	Content captured in a way so it can be used to benefit other projects
Key learnings not translated into specific plans for change	Action Plans created to improve the effectiveness and efficiency of the team
No process defined that keeps the discussions constructive (breaks down teamwork & creates “silos”)	Discussions are constructive & focus on the opportunity to learn and improve (fosters teamwork & team capability)
Led by a team member (with a possible “agenda”)	Led by an objective and neutral, skilled Facilitator (bring in a third party if needed)
No follow-up (meeting not documented; no meaningful process improvement)	Results tracked (meeting documented, results available in a central repository, process improvements implemented)