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Can’t Travel? Virtual retrospectives can be effective!

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Abstract

Tick, tock. Tick, tock. The clock is ticking. It is the end of a long SW project and the geographically dispersed team wants to spend time to look back and capture what worked well and what needs to be done differently next time so they can improve the next project. You need a process to gather learnings, but you have ZERO travel budget. What to do? This paper will explore specific key take-a-ways and Best Known Methods (BKM) you can use to prepare for and successfully execute a virtual retrospective.

Biography

Currently, Debra is the Organizational Learning & Retrospective Program Manager in the Corporate Platform Office at Intel Corporation. With over 10 years experience, Debra has delivered over 300 Project and Milestone Retrospectives for Intel world-wide. Prior to her work in quality, Debra spent 8 years managing an IT department responsible for a 500+-node network for ADC Telecommunications. Debra is a member of the Rose City Software Process Improvement Network (SPIN) Steering Committee. She currently is the President of the Pacific Northwest Software Quality Conference, Portland, Oregon. She holds a Bachelor’s of Arts degree in Management with an emphasis on Industrial Relations. To contact please email: Debra.S.Lavell@intel.com

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Introduction

Tick, tock. Tick, tock. The clock is ticking. Imagine…a Vice President of a significant project has asked you to facilitate a “lessons learned” session. This team has been working together for over 18 months. There are three software development teams spread across several time zones (California, Israel and China). You have decided to try using the retrospectives method for capturing key learnings. You know other post-project audit methods are used within your organization. Many teams feel that they are completely adequate, besides most teams don’t have a travel budget to bring the whole team together for a three-day, off-site retrospective as Norm Kerth describes in his book *Project Retrospectives: A Handbook for Team Reviews*. Because of this, you know that you will need to modify the approach as you are anticipating resistance to this new methodology. How do you proceed?

Although there are many ways to introduce change into an organization, having a defined approach and plan is fundamental in order to overcome resistance to change and to gain senior stakeholder buy-in. This paper describes the approach that was used for introducing the retrospectives methodology into Intel, a large company with many distributed teams, as well as the factors that were beneficial in gaining organizational buy-in for broad deployment – without a travel budget!

*Start with a Problem, Not a Solution*

Many times change agents become so enamored with the latest process, tool or practice which they are championing, that they try to sell the solution to the organization for the sake of the solution. In effect, it becomes a solution in search of a problem. Whether it is a new configuration management tool, risk management process, or project review methodology, we have learned that to be more successful, the approach has to be reversed. First a problem has to be identified, and then a solution can be applied. The advantage of this approach is that you are helping to solve someone’s business problem, while gaining support for your solution at the same time. Further, to increase the probability of solving the business problem, the change agent should tailor the solution to fit the organizational culture, processes, and application. If your company is anything like Intel, this is critically important in order to get over the “not invented here” hurdle.

In 2001, after reading Norm Kerth’s book I was so moved by the possibility of a better, more effective way to capture learnings that I decided introduce the method into Intel. It took a few months, but an opportunity to pilot the practice became available with a team who had invited our organization to help them improve their requirements engineering practices. The intent was to uncover what worked well on their last project, and to identify what the team wanted to do differently on the next project – which at the time was entering the requirements gathering and specification phase. Comments from the
team such as “our requirements sucked last time” prompted us to ask the project manager if she could get the team together to do a retrospective to find out what they really meant by “our requirements sucked” and what the business impacts were.

Intel has many globally dispersed teams; for example one software team was dispersed, with members in three time zones and getting them together face-to-face was becoming more and more difficult. After a kick-off meeting it could be 18 months before the team would be able to travel. In late 2008, Intel declared a “no travel” policy, as a way to save dollars and preserve jobs. Conducting retrospectives without a travel budget meant we had to re-think our approach to keeping the participants engaged and still gather learnings. Full day, face-to-face meetings were now a thing of the past, so we had to come up with a new strategy to uncover and gather the key learnings.

**Begin Small and Establish Pull**

When introducing a new idea into an organization, we have found that it is beneficial to begin with a small implementation, and expand once demonstrable results are achieved. We always try to begin with a proof of concept or pilot implementation so we can control the organizational variables involved. This “incubator” approach increases the probability of successfully achieving positive business results.

We followed this approach for retrospectives by approaching a single project manager within Intel who we knew would be open to trying something new and had a business problem to solve (requirements that sucked). We held several two-hour virtual meetings with small teams, over a telephone bridge. We used a collaboration tool (Live Meeting) to gather the team’s feedback on what happened on the previous project. The sessions were held during normal business hours convenient for the team members. The team in India spent an additional hour harvesting the data to identify primary sources of the problem and to develop action plans going forward. As the facilitator was in Oregon, which meant a late night for her, but the team was engaged because it was morning for them so they were fresh and ready to get their ideas captured. At the end of the meeting, she asked the team if they felt the time spent generating insights was valuable. The feedback from the team was overwhelmingly positive.

In fact, the project manager was so pleased that he agreed to sponsor additional retrospectives within their organization, and pitch retrospectives to his senior management team as a standard method of collecting and implementing project learnings. The senior management team was so intrigued by the results of the initial retrospective that they implemented mandatory end of project retrospectives for every project in their business group. Over the course of a year, we facilitated over 15 retrospectives within that business unit. From the data that was collected, common themes and improvement opportunities emerged which resulted in standardization of some key program and project management processes, such as good requirements engineering practices. Additionally, the retrospectives methodology was established as a standard practice by touching all programs, multiple times across the lifecycle.
What happened next was a bit surprising and exciting. Program and project managers from other business groups started to hear about the results that were being realized in the original business group, and wanted a piece of the action. “We want what they have” was a common statement from the other business groups. By demonstrating positive business results, we created pull for retrospectives at a much greater scale than had ever been anticipated.

Fast forward to 2009, we now have over 10 trained facilitators in India to support the requests. We conducted the training session using video conferencing technology where we could effectively train the new facilitators’ long distance, with the instructor in Oregon and facilitators in Bangalore. By starting small, establishing pull we now have an established process and trained facilitators which didn’t require any travel.

**Tailor the Solution as Needed**

As more and more teams were conducting post-project retrospectives (to improve their requirements processes) we came to realize that by facilitating a mid-cycle retrospective, for example, right after the requirements specification was complete it would allow a team to capture planning learnings as they occurred and when their memories were still fresh. This change in the retrospective methodology created the opportunity for a project mid-way through their planning phase, to benefit from the learnings and implement improvement actions. The program and project teams no longer had to wait until the next program or project to realize the benefits.

We have data to support we are able to achieve better results by conducting multiple retrospectives along the way, and implementing improvements into an organization faster. The standard retrospective methodology that we now use at Intel recommends multiple retrospectives at three strategic milestones (after requirement definition, after Alpha and after launch) during the course of a project lifecycle.

**How did we do it?**

We started by looking at the team’s recent milestone: Alpha. We wanted to make sure we catch the team and stop right after a major milestone to gather their learnings. We worked with the project manager to identify an already established team meeting where the key stakeholders regularly met to discuss the project. If it wasn’t already two hours, we asked to extend it so we had adequate time to review feedback gathered via a pre-work survey. We found going longer than two-hours was too difficult for those who were dialing in from another time zone. Since the meeting was already a “virtual” meeting it was easy to modify the agenda to focus on reflecting on what the team experienced to deliver their Alpha code. Below is an example of the email notice to attend the retrospective:

*As part of continuous process improvement, we will dedicate next Wednesday’s normal Product Development Team meeting at 10am (Pacific Standard Time) to discuss what worked well and what we may want to do differently as a result of our Alpha release. We will use our learnings going*
forward to improve the effectiveness of the team. Please note, I have extended our normal one-hour meeting to two-hours, so we can meet the objectives of a retrospective which is:

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

The next thing we did was negotiate with the sponsor the agenda. Below is an example agenda:

**Agenda 7:30 – 9:30 pm (Pacific Standard Time)**

<table>
<thead>
<tr>
<th>When</th>
<th>What</th>
<th>Expected Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 min</td>
<td>Introductions/objectives &amp; ground rules</td>
<td>Align on purpose of the meeting &amp; enable an effective meeting</td>
</tr>
<tr>
<td>10 min</td>
<td>Quick Program Overview</td>
<td>Ensure we understand the scope of the retrospective, value proposition and timeline</td>
</tr>
<tr>
<td>60 min</td>
<td>Review survey data to identify key messages from the feedback</td>
<td>Break into smaller sub-teams to synthesize raw data into top learnings</td>
</tr>
<tr>
<td>30 min</td>
<td>Short report out from each break out team</td>
<td>Identify recommended focus areas &amp; common themes</td>
</tr>
<tr>
<td>10 min</td>
<td>Wrap up and set next steps</td>
<td>Discuss how the team will create action plans with the owners</td>
</tr>
</tbody>
</table>

Notice 90 minutes of the two-hour meeting is where we break into smaller sub-teams and report out the key messages. How would we do that virtually? Since the meeting is on a telephone bridge, using a collaboration tool such as Live Meeting we would start on one main bridge line. Get started and then break into three teams (Team A, B and C) where we pre-assigned a new bridge number to dial into, a survey question or two for them to discuss offline with a pre-set facilitator and a timekeeper.
Here is an example of the email to recruit the facilitator and the timekeeper:

Hello,

I could use your help tomorrow during the Website Software Project retrospective.

Jason and Scott: would you be willing to lead a small break out team discussion during the retrospective? Your role is to help the team create a summary slide of the survey data.

Don’t worry, this requires no preparation – we will be walking you through the process, however, we wanted you to be aware we will be asking you to:

- Scott: drop off the main bridge and go to another bridge I have set up
- Jason: stay on the main bridge (see attached slides)
  Lead the team to create a summary slide with key messages associated with the survey questions your team has been assigned (see attached slides)
- Email the slide(s) back to me so I can display it to the larger group
- Report out the roll up summary of the key messages from the discussions in your group

Don and Jeff: would you be willing to communicate with me via IM as a timekeeper? Help me gauge how your team is progressing and if needed – let me know if there are any questions that need answers.

If you feel uncomfortable in these roles, please let us know ASAP so we can assign another person to help us tomorrow.

Thanks,

Once we had all the roles assigned and the process clear to everyone, the retrospective participants would drop off the main bridge, go to their assigned team and begin synthesizing the survey data. The sub-team facilitator would help them pull out the top 3-5 items they felt were important and the timekeeper would stay on IM with me to ensure they would email me their completed slide so I could display it once everyone came back to the original bridge. We would ask someone from each team to report out their findings and discussions with a broader audience to ensure we didn’t miss anything important.

After the sharing of the key messages, the next step is to uncover emerging themes and prioritize what is important to the team. What is the team interested in spending time to go fix? Who has the energy and passion to spend an hour outside this initial meeting to write an action plan? Who else, besides the attendees should be included in the action planning, so we can ensure change happens?

We have found forming smaller sub-teams to work on action plans, after the two hour retrospective allows those with passion to spend time (one hour) to get to root cause and offer recommendations to fix the issue.
The last step, typically a week later, is to come back to the larger group to report out the action plans the sub-teams developed. Do we have any gaps? Did we identify the root cause? Are the recommendations complete? Will the broader team support the next steps? Can we break down the next steps into 2-3 week increments with owners and due dates so we can make forward progress?

Below is the four-step, closed loop process we have been describing:

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**The Four Phases of a Retrospective**

1. **Planning**
   - Plan the logistics
   - Collect and organize project objective data
   - Conduct Retrospective Survey
   - Analyze survey data

2. **Retrospective Meeting**
   - Review Survey Data
   - “Harvest” the data for common themes
   - Identify volunteers to create action plans

3. **Plan for the Future**
   - Sub-teams to write action plans.
   - Assign owners & execute Action Plans
   - Communicate outcomes to Management

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

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By tailoring our approach we were able to work within the needs of the team. We learned:

- Use an already set meeting (don’t add an additional meeting to their already busy calendar)
- Focus on a specific milestone
- Break into smaller working teams to ensure everyone participates fully, both for synthesizing survey data and writing action plans
- Use a neutral facilitator so all perspectives are being heard
- We saved the travel budget

The feedback from the teams has been tremendously positive! Teams like the way we are able to cover a lot of ground in a short period of time by being creative with sub-teams and additional phone bridges. In addition, we use the technology to our advantage and no one had to leave their cube or comfy home office.
**Gain Senior Management Support for Broad Deployment**

Organizational buy-in is vital for the wide-spread success of any initiative, and senior management support is critical to achieving that buy-in. However, senior managers don’t have to be intimately involved from the beginning. Allowing a new idea to gain support and momentum prior to exposure to senior management is a good strategy, as we have demonstrated. Normally, to gain wide-spread adoption (and organizational support) for the new idea, it does require the endorsement and advocacy of the senior leaders of an organization.

Since 2001, the momentum for retrospectives has bubbled up to the senior management level many times as a result of a program or project team sharing learnings and distributing action plans within a business group. During one project retrospective, where the project manager wasn’t originally sure he wanted to do a full retrospective, the senior manager of the business group was invited to participate. As the end of the process, the senior manager stated that he liked the result of the “new” approach and wanted all teams to adopt this methodology. The funny part was that unbeknownst to the senior leader, the large majority of the teams in his organization were already doing some form of retrospectives.

Senior management support has allowed us to approach teams who had previously shunned the new practice. Each year we have facilitated more retrospectives. At one point, the pull for a skilled, retrospective facilitator was more than one person could keep up with. To accommodate the increase in demand, we established a full day training course to develop facilitators in each business unit. Our philosophy is that we want to train at least two program managers from each business unit so they can be a resource for the whole group. Growing the skill set within the business unit allowed more retrospectives to be conducted. To date we have over 120 trained facilitators at Intel, in several international locations with a growing need for facilitators in China, Russia, and Japan. Positioning facilitators in different parts of the world has decreased the cost for travel because we always try to use a local resource or at least on the same time zone to avoid any travel.

This scenario takes years to achieve. What if you don’t have eight years to build momentum for retrospectives? How would you approach a senior manager who has not expressed an interest in retrospectives? We have found that the higher you go into an organization, the more important it is to be able to articulate the benefits of retrospectives to gain organizational buy-in. Showing senior managers that retrospectives can improve productivity, reduce costs, and increase efficiency all helped gain support for retrospectives across our company – and if it doesn’t require travel, all the better!
Conclusion

The next time you are asked to collect lessons learned, try conducting a virtual retrospective! There are many advantages:

- Focus on current problems within the team or organization
- Start small, with a team who is open to trying a retrospective
- Show results on a pilot implementation, then others will come knocking on your door
- To accelerate the adoption, meet with top leaders to share results and educate them on the benefits of multiple retrospectives, spread across the lifecycle of a project

Rather than ask senior leaders to mandate “all programs and projects shall conduct a retrospective at three strategic milestones” we have found a more organic, bottoms-up pull for the practice has worked at Intel. This approach has proven to be our recipe for successful organizational buy-in which resulted in obtaining resources needed to persuade teams and business groups to adopt retrospectives as a common practice for capturing key learnings and driving improvement actions.

References