Can't Travel? Virtual Retrospectives can be effective!

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Rev 0.3
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

OR & CA
8 AM

Hudson, MA
11 AM

Shannon, IR
4 PM

Israel
6 PM

India
9:30 PM

Malaysia
12:00 AM

www.nist.time.gov

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

3. **Virtual Action Planning Meeting**
   - 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
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)

<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 retrospective Enable an effective meeting</td>
</tr>
<tr>
<td>10 min</td>
<td>• Quick Program Overview</td>
<td>Scope, value proposition &amp; timeline</td>
</tr>
<tr>
<td>60 min</td>
<td>• Review survey data to identify key messages from the survey questions</td>
<td>Break into smaller teams to synthesize raw data into key messages</td>
</tr>
<tr>
<td>30 min</td>
<td>• Short report out presentation 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 the action plans outside of the meeting today</td>
</tr>
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</table>
# Session 2: Agenda 7:30 – 9:30pm (Pacific Time)

<table>
<thead>
<tr>
<th>When</th>
<th>What</th>
<th>Expected outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 min</td>
<td>• Review key messages from session one</td>
<td>Align on purpose of this second meeting retrospective</td>
</tr>
<tr>
<td>50 min</td>
<td>• 10 min: Instructions for Action Planning</td>
<td>Write two action plans</td>
</tr>
<tr>
<td></td>
<td>• 40 min: Work in smaller sub-teams</td>
<td></td>
</tr>
<tr>
<td>40 min</td>
<td>• Report out (each team has 15-20 min)</td>
<td>Share with broader audience to ensure we fill gaps and answer questions</td>
</tr>
<tr>
<td>10 min</td>
<td>• Wrap up and set next steps</td>
<td>Share how the outcomes from today will be used</td>
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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
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

<table>
<thead>
<tr>
<th>Elicitation</th>
<th>Analysis &amp; Validation</th>
<th>Specification</th>
<th>Dissemination</th>
<th>Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gathering learnings from teams</td>
<td>Analyzing, discussing, and ensuring correctness of the learning</td>
<td>Documenting the key learnings from the Recommender into the database</td>
<td>Receiver committing to change &amp; applying learnings to current or subsequent programs</td>
<td>Maintaining and tracking the results</td>
</tr>
</tbody>
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↔ 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?

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