Agile Meetings:
Facilitating High Performance Task-Oriented Meetings

David Chilcott

Outformations, Inc.

OUTFORMATIONS

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?

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?

Why do we care?

- 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?

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...

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

Desired Outcomes:

By the end of this session you will have:

- A better understanding of the 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.

Questions/Comments/Concerns?

- Any questions?
- What's puzzling you so far?

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Agile Meetings? What the heck?

- Agile Meetings and Agile Work
- Business Case
- Agile Meeting Mental Models
- Questions/Comments/Concerns?

Agile Meetings and Agile Work:

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

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

Reduce Meeting Costs

Average hourly rate of your group members	$100/hr
Average number of members per meeting	5 people
Typical meetings duration	2 hours
Meetings you attend each week	5/week

$8.33/min $500/hr $5000/week $250,000/year

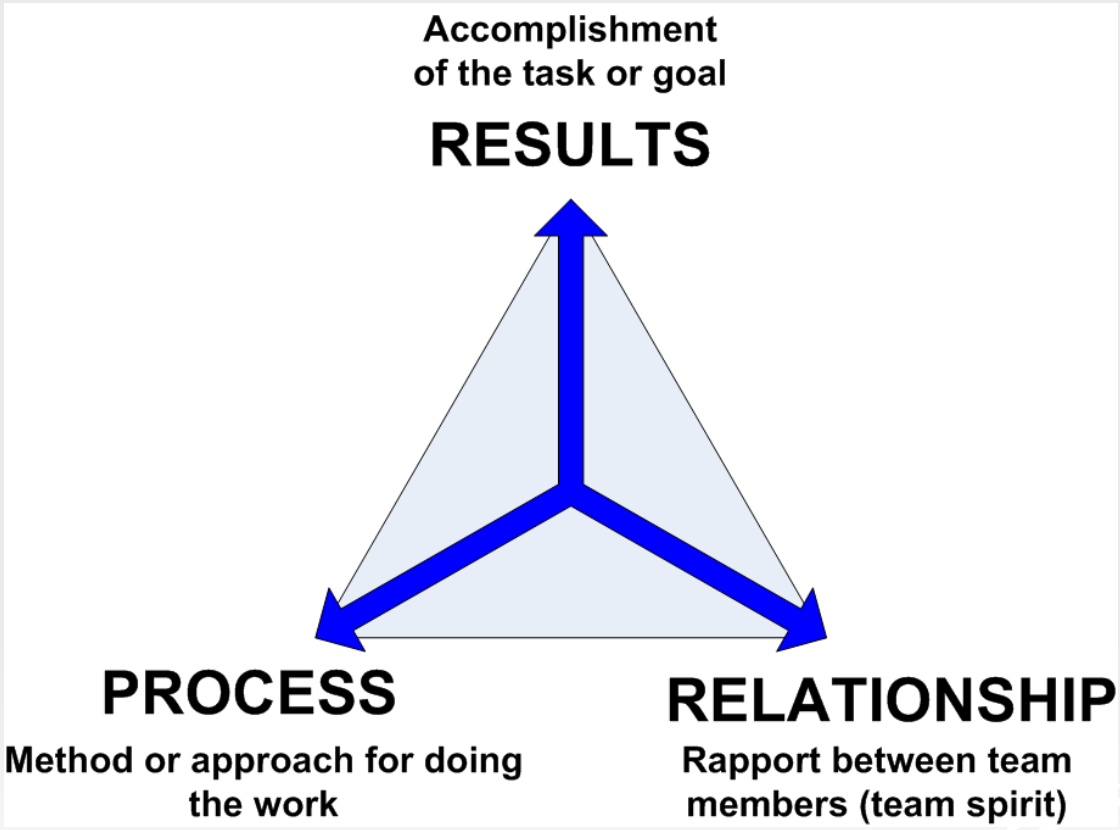
Assume Agile Meetings improve our performance by:

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 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**~~

Dimensions of Success

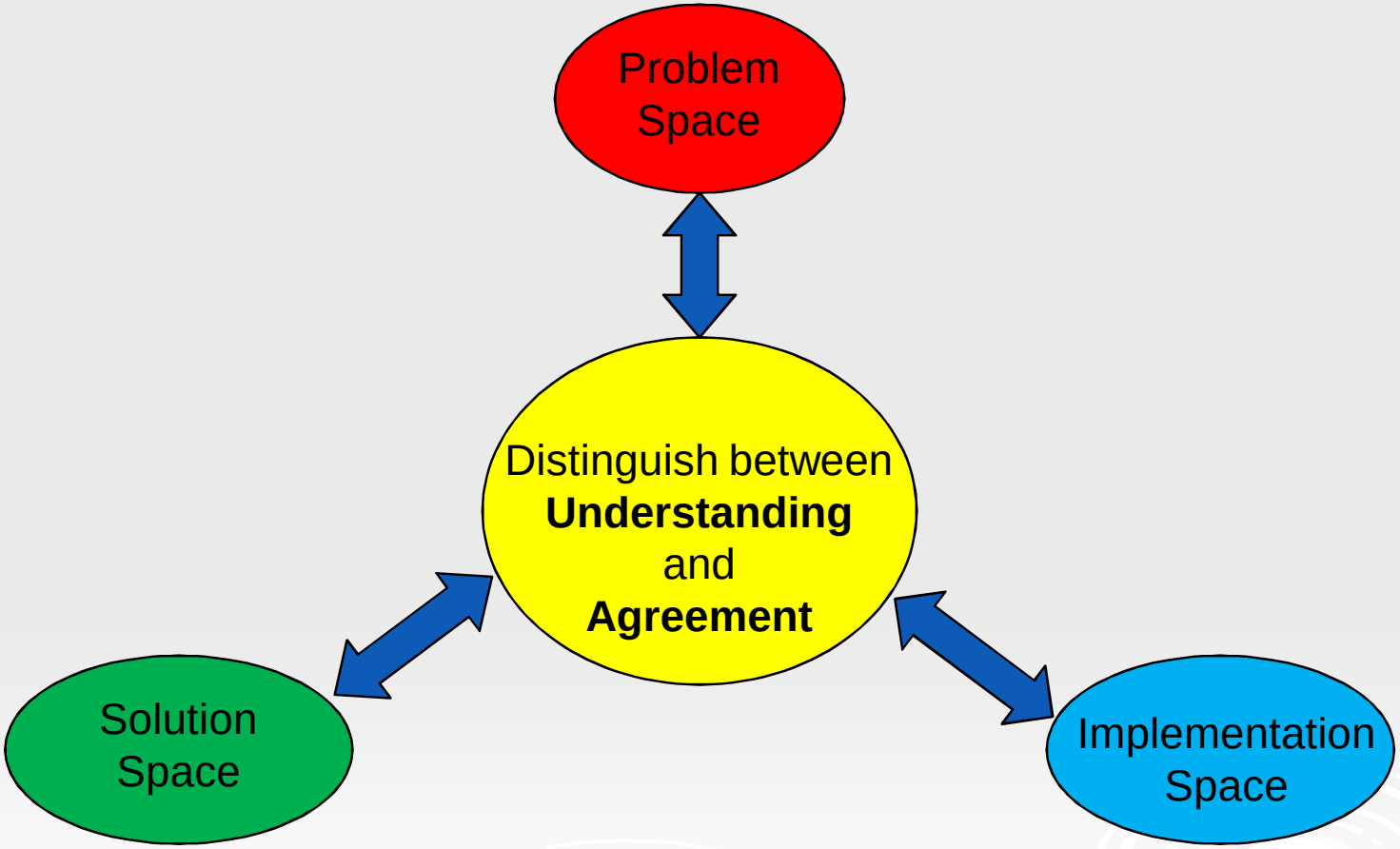


Balance Results, Process, and Relationship

Shared Responsibility

Facilitated Self-Organization

Problem Solving Spaces



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)

Questions/Comments/Concerns?

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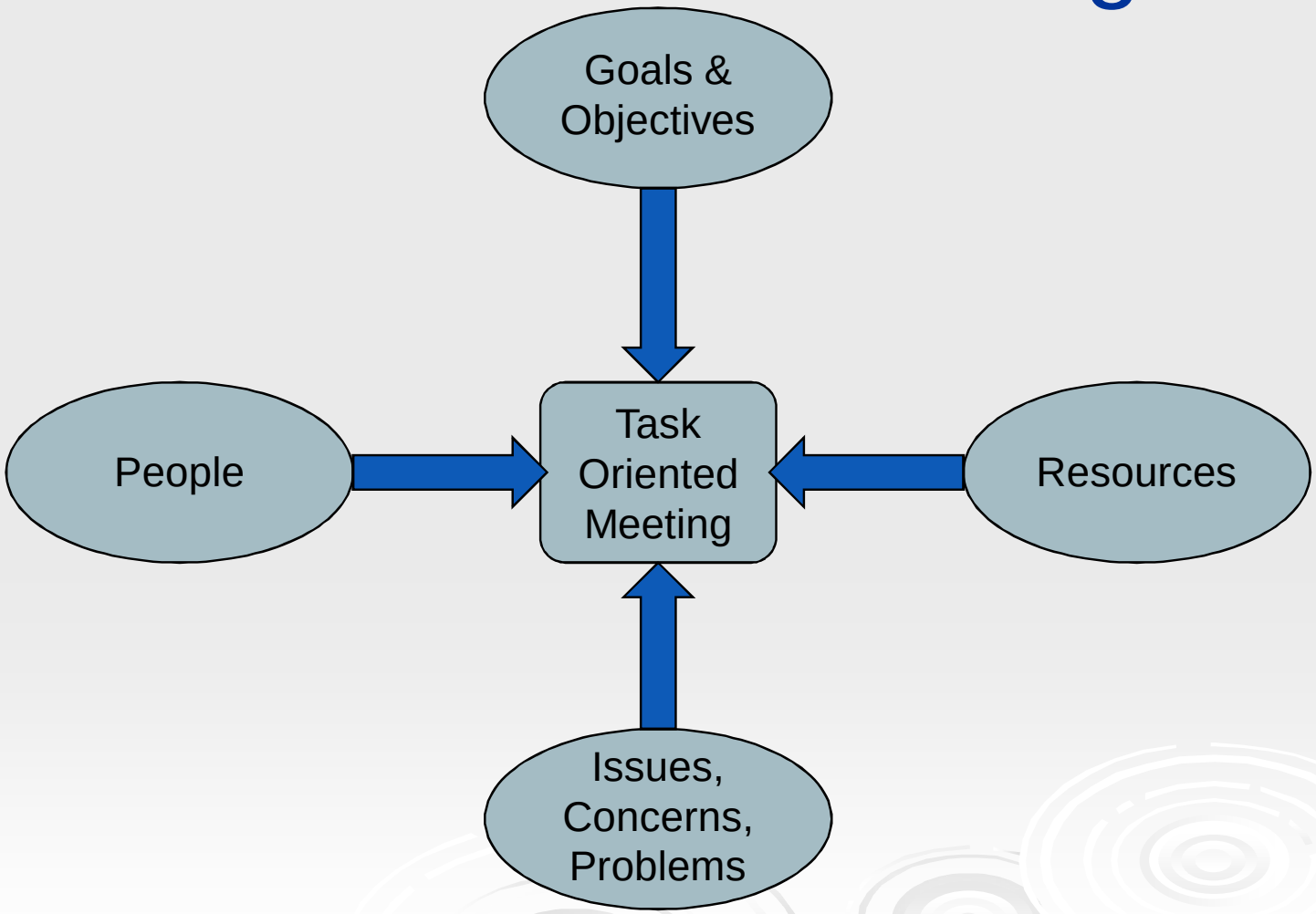
Agile Meeting Structure

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

Agile Meeting Structure

TASK-ORIENTED Meeting



OUTFORMATIONS

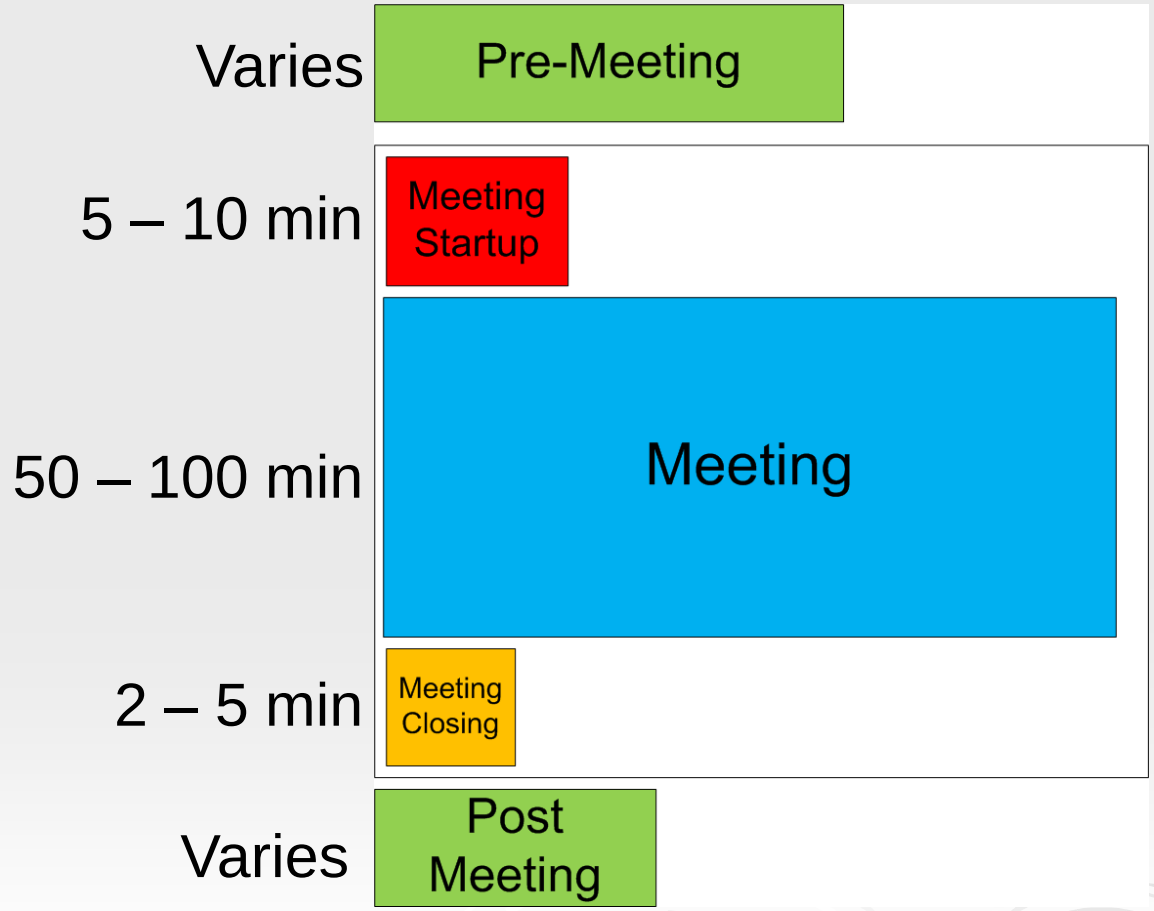
Agile Meetings have:

- 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 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 1st**
  - 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**

Meeting Structure Overview



Agile Meeting Structure

Pre-Meeting Overview

Purpose	Room Arrangement
Context Assessment	Decision-Making Method
Stakeholder Analysis	Detailed Agenda
Desired Outcomes	Meeting Functions
Topics/Issues	Meeting Supplies
Attendees & Roles	

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:

Agile Meeting Structure

Meeting Agenda Overview

- Agenda Items 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!

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

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

Questions/Comments/Concerns?

- Any questions?
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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

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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

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- **Key Points Review**
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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?

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- ✓ 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

Closing Comments:

- **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?

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:

- Interaction Associates - http://www.interactionassociates.com
- Outformations Agile Meeting Training - http://www.outformations.com

Meeting Templates: Available at 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?

OUTFORMATIONS

Thanks…

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