A group of people are gathered around a large conference table in a meeting room. The room has large windows and walls covered in numerous colorful sticky notes. Several laptops are open on the table, and there are coffee cups and water bottles. A man in a blue shirt is standing and looking at a laptop, while others are seated and engaged in discussion.

Driving Collaboration in Distributed Teams

Agile in Action Charlotte, NC

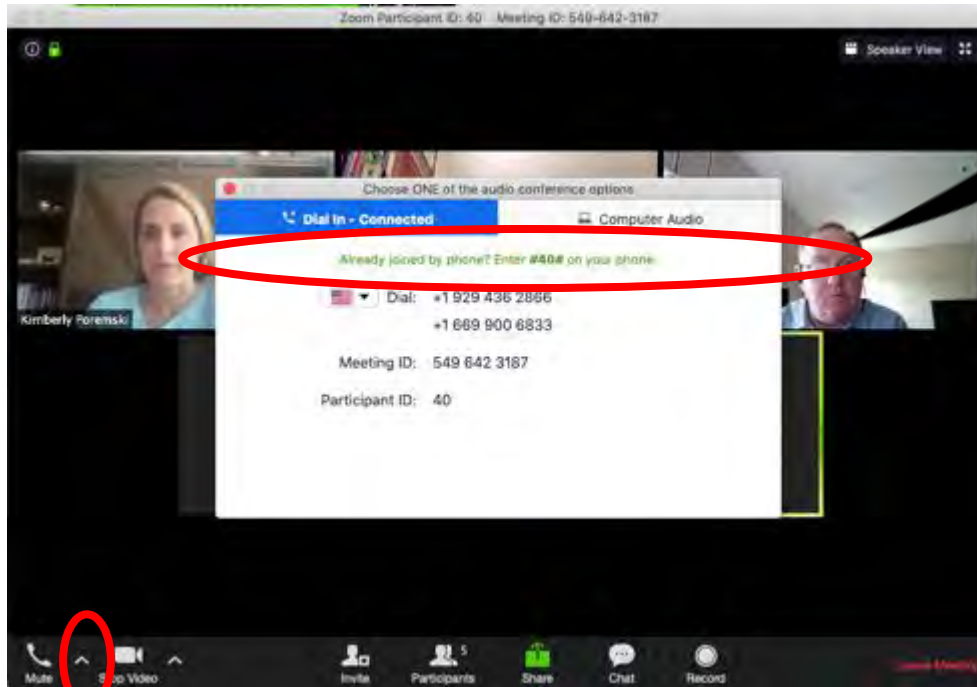
March 13, 2020

Meetup Session Agenda



- **Welcome & Introductions:** Kert Peterson
- **Mindset & Methods of a Distributed Facilitator:** Kim Poremski
- **Customer Collaboration:** Laura Richardson
- **Q&A (as time permits)**
- **Closing & Next Steps**

Housekeeping



Already joined by phone? Enter #_ _# on your phone.

Please confirm that if you are dialing in for voice, that your video and voice are joined.

We are recording.

Post questions on chat.

Agile in Action

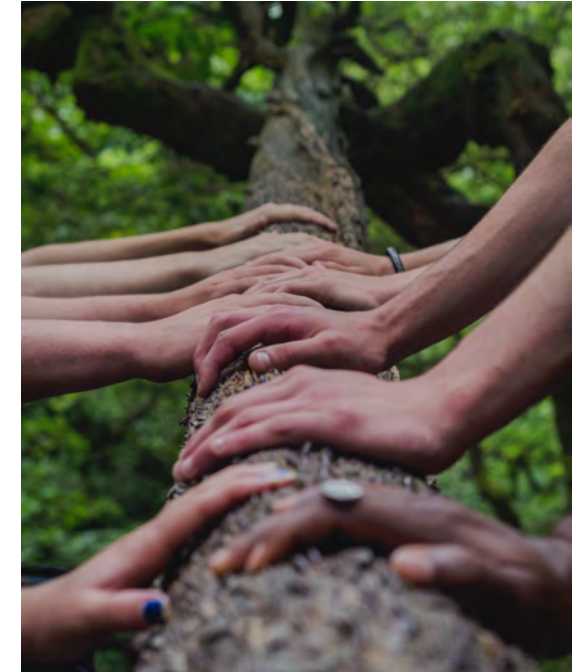


Our Mission

Agile in Action exists to develop skills that inspire, enable, and grow the businesses of tomorrow.



Your Learning Laboratory



**Learn by
doing!**

About your Presenters



Kim Poremski



Laura Richardson



John Mulligan



Kert Peterson

Small Group Introductions



In a moment, we will place you (along with 2-4 others) in a zoom break-out room and allow you to introduce yourselves.

In your small-group, Each person will share the following:

- 1) Name**
- 2) Hometown**
- 3) The single biggest challenge with distributed teams**

Group Word Cloud



INSTRUCTIONS

- 1) In the chat window of your zoom session, type your “single biggest challenge” with distributed teams (chat to “everyone”)
- 2) John will collect responses and generate a word cloud for us to view and reflect on



What is your favorite Agile Value?





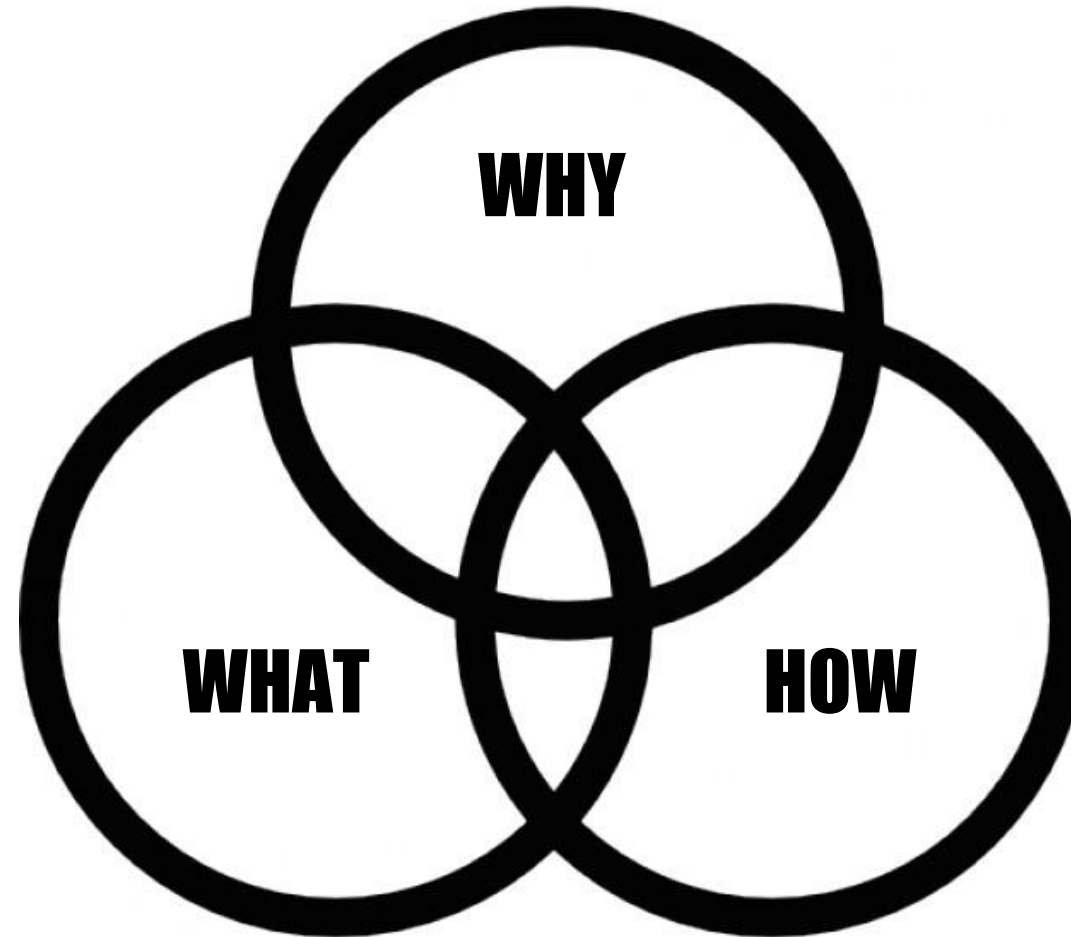
Kim Poremski
Principal Consultant
CSP, SPC

MINDSET & METHODS of a DISTRIBUTED FACILITATOR

Facilitate Meetings with Intention



Your Purpose



Engagement
Productivity
Shared understanding
Collaboration
Ideation
Decisions

**The “Triple 3”
Framework**

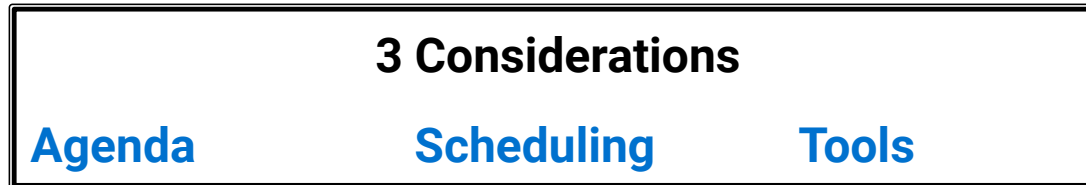
The Triple 3 Facilitator's Framework



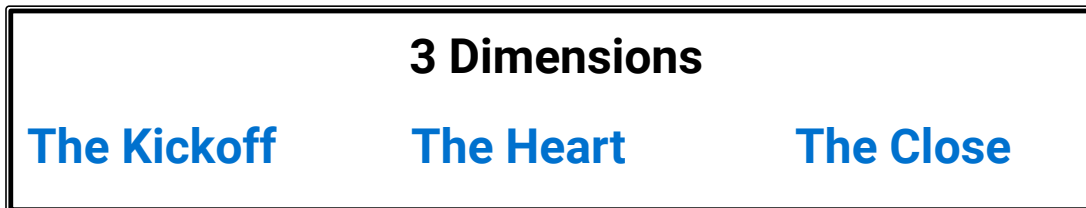
1. Think about yourself



2. Think about your participants



3. Think about your approach



Conference Call Pet Peeves



What are your TWO biggest pet peeves when you are on a conference call?

Somebody's dog barking in the background	
Noisy background (airport, car, coffee shop, etc.)	
Kids audible in background	
Heavy breathing on the phone	
Someone put themselves on hold with hold music	
Audio cutting out when someone is talking	

Think About Yourself - 3 Environments



- **Personal**
 - Be “video ready” - step 1
 - Eat ahead of time, not during
 - Have water, tissues, cough drops, etc. available
- **Physical**
 - Be “video ready” - step 2
 - Eliminate existing or potential background noise
 - Prepare your desk; clear desk = clear head
- **Technical**
 - WiFi connection
 - Close unnecessary apps and windows; eliminate pop-up notifications
 - Launch and login to apps you will need during the call
 - Charge devices (headphones, cell phone, computer)
 - Login ~5-10 minutes early

Remember This Guy?



Video Preferences - Let's Take a Poll!



Given the choice, I would rather:

- Use video, even if most people are not
- Use video, but only if most people are
- Not use video whenever possible

Think About Your Participants - 3 Considerations

- **Agenda**

- Publish in advance
- Build breaks into the agenda
- Provide video links in advance

- **Scheduling**

- Consider participants' timezones

- **Tools**

- Select a conferencing tool that supports:
 - Group and individual chats
 - Whiteboarding
 - Breakout sessions
- Do a test run if you are using a new tool or allocate time in agenda for learning curve

Think About Your Approach - 3 Dimensions



“How you enter a space and how you leave a space is as important as what happens in the space.”

Emily M. Axelrod

- **The Kickoff**
- **The Heart**
- **The Close**

Think About Your Approach - The Kickoff



- Allocate a start time buffer
- Choose to record (or not) and notify participants
- Establish working agreements
- Use a check-in protocol

Working Agreements

Everyone on mute except person talking

5 minute break at the top of each hour

Everyone is highly encouraged to use video

If you have to leave early or step away, send message to group in chat window

*Anyone can **ELMO** a discussion (**ELMO** = enough let's move on) by holding up 3 fingers on video or using chat*

The Check-In Protocol



**Provided a question, give
a one word check-In.**

**Example: What is one
word that would best
describe how you felt
coming into today's
session?**

**What is the biggest
thing on your mind
right now?**

**What is the best thing
that has happened
today/this?**

**What is your desired
key takeaway from this
meeting?**

Think About Your Approach - The Heart



- Clarify goals and intended outcomes
- Incorporate tools and collaboration frameworks
- Actively engage participants
 - Physical breakouts
 - Virtual breakouts
- Use decision-making facilitation tools
 - Dot voting
 - Roman voting



Think About Your Approach - The Close



- Confirm if goals and intended outcomes were met



- Recap decisions, action items, & next steps



- Use a check-out protocol

- Key takeaway
- Remaining questions
- Fun analogy



???



Sample Agenda



The Kickoff

10:00 - 10:05: Participants connect to interactive session

10:05 - 10:10: Review goals, intended outcomes and team working agreements

10:10 - 10:15: Check-in

10:15 - 10:30: Discuss Onboarding Client X

- Do we have the names of Client X's employees to upload?
- What migration activities still remain?
- How should we address duplicate records?

The Heart

10:30 - 10:45: New Remote Policy

- What questions do we have about the policy?
- Who will be our remote team captain?
- How do we setup our computers to access the company's VPN system?

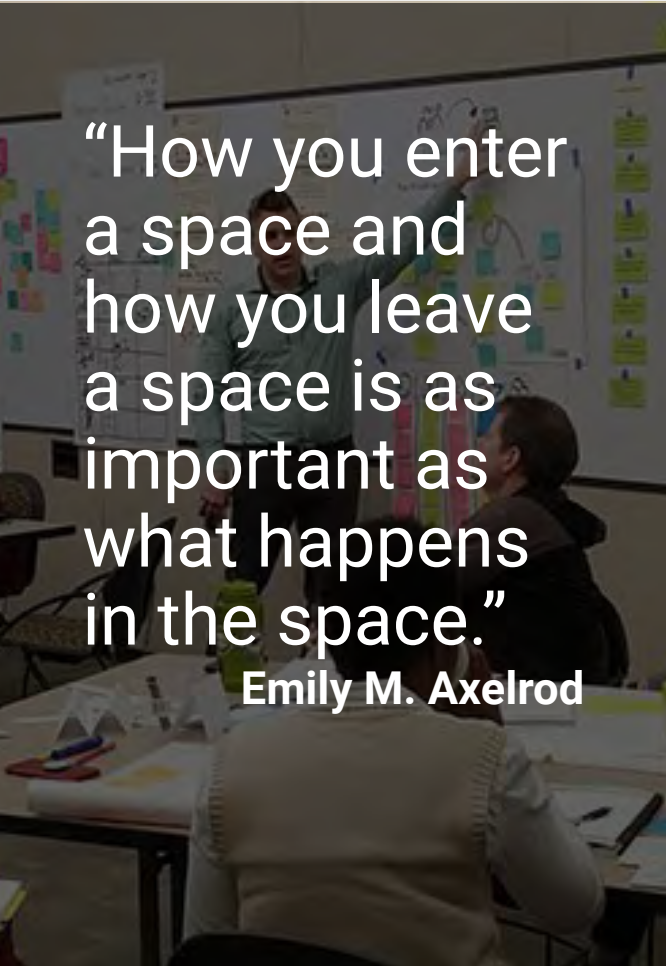
The Close

10:45 - 10:50: Discuss if goals and intended outcomes were met

10:50 - 10:55: Confirm decisions and next steps

10:55 - 11:00: Check-out

Think About Your Approach - 3 Dimensions



“How you enter a space and how you leave a space is as important as what happens in the space.”

Emily M. Axelrod

- **The Kickoff**

- Allocate a start time buffer
- Choose to record (or not) and notify participants
- Establish working agreements
- Use a check-in protocol

- **The Heart**

- Clarify goals and intended outcomes
- Incorporate tools and collaboration frameworks
- Actively engage participants
 - Physical breakouts
 - Virtual breakouts
- Use decision-making facilitation tools
 - Dot voting
 - Roman voting

- **The Close**

- Review if goals and intended outcomes were met
- Recap decisions, action items, next steps
- Use a check-out protocol



Laura Richardson
Senior Vice President
CSM, SPC

STAKEHOLDER & CUSTOMER COLLABORATION

Great Meetings Create Amazing Products

Agile teams are fueled
by Customer Insights



Engaged
Participants

Celebrating
Hard Work

3 Key Elements for Meeting Success



1. **Clear Central Question**
2. **Right Participants**
3. **Make it Interactive**

Clear Central Question



What are the most important features that help managers, who pay for my product, use and love my product? *(I need help prioritizing my backlog)*

How would my enterprise customers like to see our solution grow over time? *(I need to understand where to invest based on feedback from our most valuable market segment)*

What do the users of my current product find really difficult in their current roles. *(I am looking for unmet needs)*

Invite the Right Participants



What are the most important features that help **managers**, who pay for my product, use and love my product?



Managers

How would my **enterprise customers** like to see our solution grow over time?



**Enterprise
Customers**

What do **the users** of my current product find really difficult in their current roles.



**Active
Users**

Make it Interactive

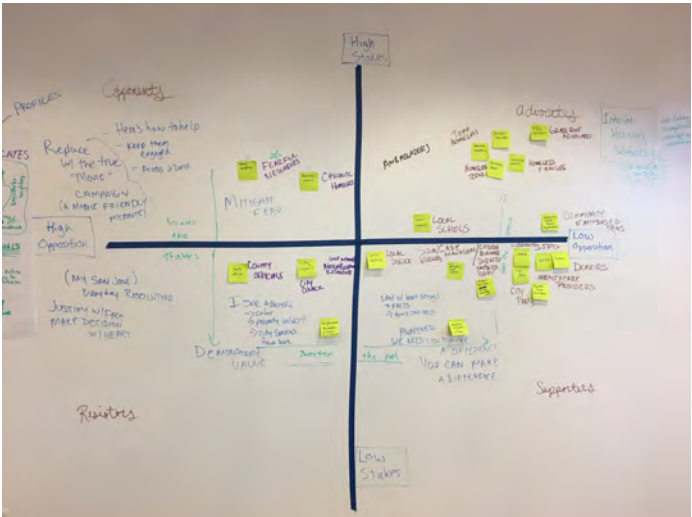
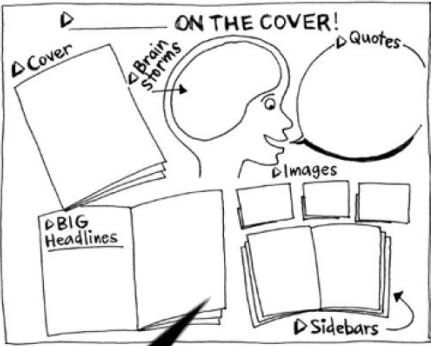
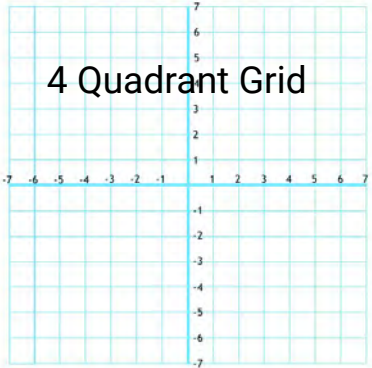
Incorporate Collaboration Frameworks

A **framework** is a tool that enables knowledge workers to perform their jobs.

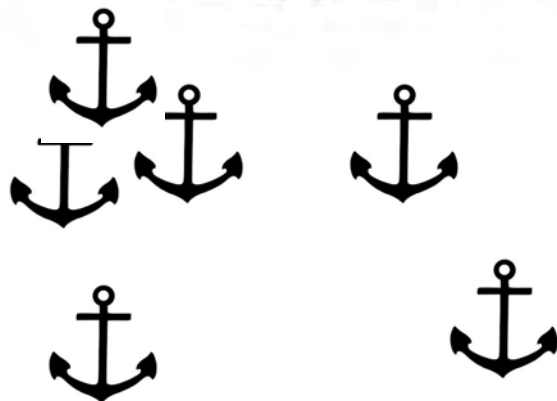
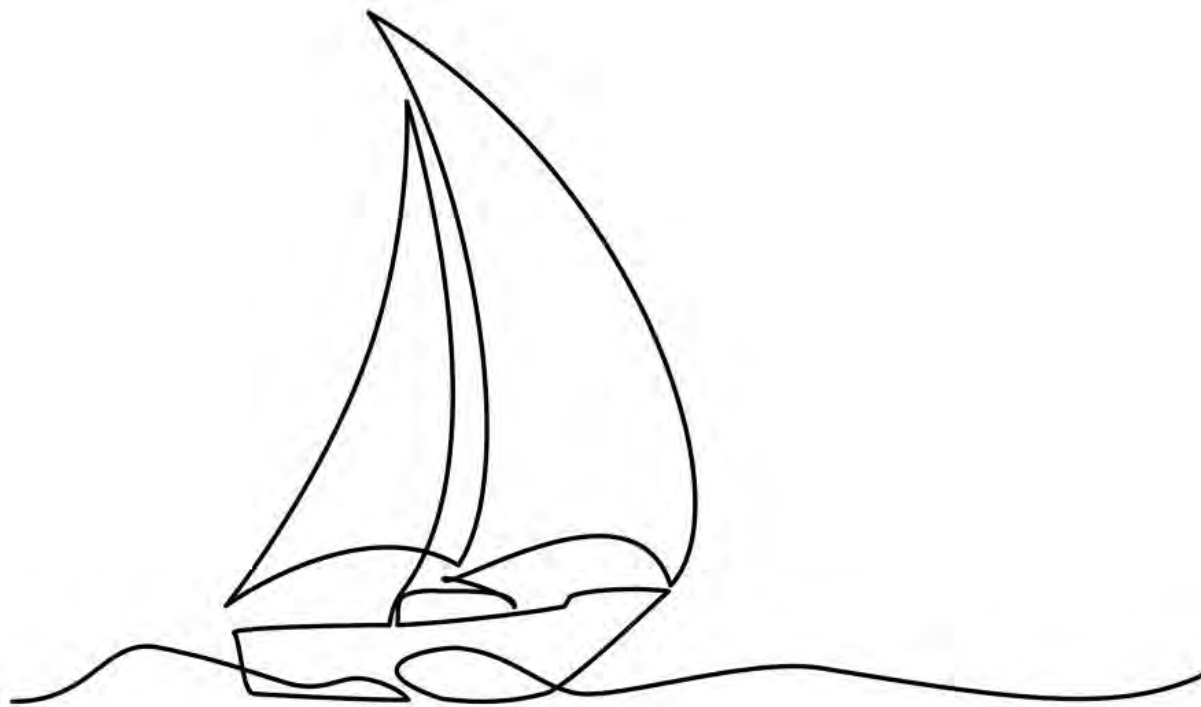
1. Solve a problem.
2. Fit into a process.
3. Scale for both in-person and online use.



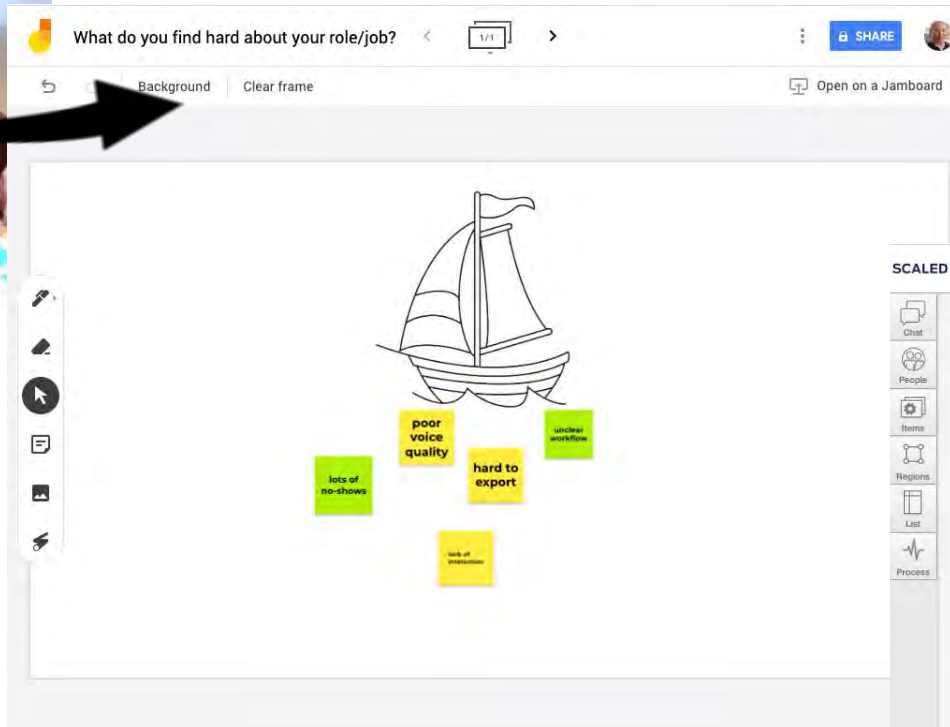
Collaboration Frameworks in Action



Sailboat



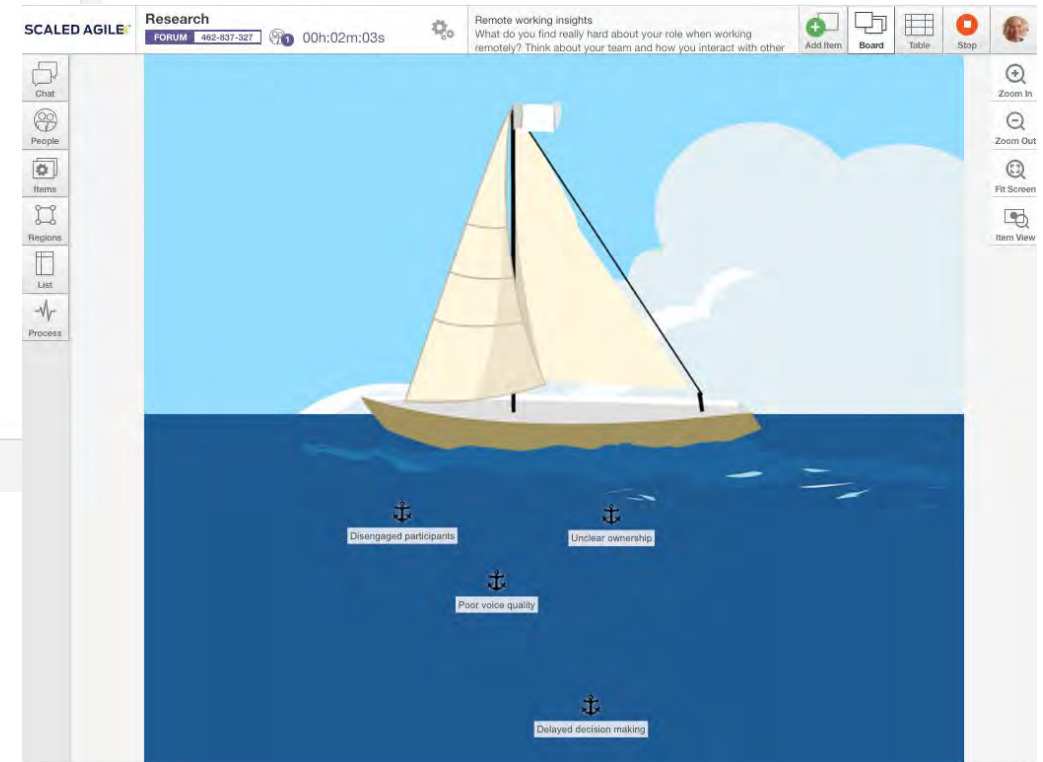
Online Customer Events can be Interactive!



jamboard.google.com



weave.scaledagile.com

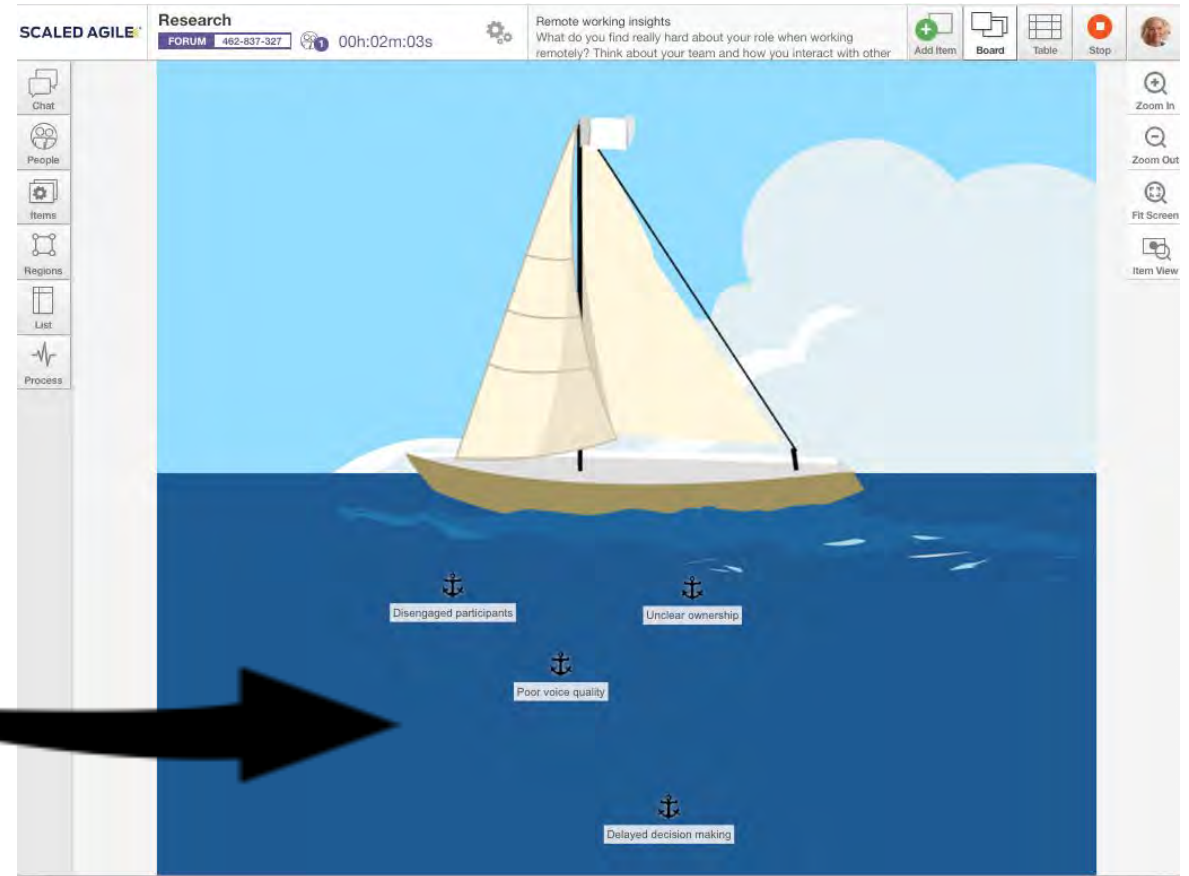


Let's Try Sailboat

Central Question: What do you find hard about your role when working remotely?

<https://weave.scaledagile.com/forum/join?id=468-111-723>

Tip:
double-click under the
water to add your anchors



Wrap Up Poll Question



What tools and platforms do you have access to that can help you make your Customer Advisory Boards Interactive?

Thank you for Joining!

NEXT STEPS

Look for a follow up email with a link to our resource page.

- **Resources Deck for Download**
- **Online Academy for On-Demand Online Courses**
 - Advanced Facilitation
 - Story Writing
 - Advanced Scrum Certification with Live Coaching
- **Online Instructor-Led Courses**
 - Distributed Team Facilitation for ALL Teams
 - Scrum for Distributed Teams



Contact Us - Session Presenters



KimPoremski

Principal Consultant

+1-410-746-9929

kporemski@appliedframeworks.com

twitter.com/CoachPoremski

linkedin.com/in/kimberlyporemski

appliedframeworks.com

AGILECONSULTING|ONLINETRAINING|CLASSROOMTRAINING



LauraRichardson

SVP of Sales

+1-415-265-2200

lrichardson@appliedframeworks.com

twitter.com/lcaldie

linkedin.com/in/lauracaldierichardson

appliedframeworks.com

AGILECONSULTING|ONLINETRAINING|CLASSROOMTRAINING

Contact Us - Session Hosts



John Mulligan

Principal Consultant

+1-804-513-4159

jmulligan@appliedframeworks.com

twitter.com/AgileMulligan

linkedin.com/in/johnmulligan/

appliedframeworks.com

AGILE CONSULTING | ONLINE TRAINING | CLASSROOM TRAINING



Kert Peterson

Principal Consultant

+1-919-914-2884

kpeterson@appliedframeworks.com

linkedin.com/in/kertpeterson

appliedframeworks.com

AGILE CONSULTING | ONLINE TRAINING | CLASSROOM TRAINING



Relevant Links



For further reading

- **Dot Voting Explained** - <http://dotmocracy.org/dot-voting/>
- **Roman Voting Explained** - <https://www.conferencesthatwork.com/index.php/event-design/2012/06/testing-consensus-using-roman-voting/>
- **Build Working Agreements Fast** - <https://cspfastpass.com/2018/02/16/build-working-agreements-fast/>

Just for fun!

- **Conference Call in Real-Life (a humorous interpretation)** - https://www.youtube.com/watch?v=z_tiqIBFjbk
- **BBC Interview Interrupted (real-life humor)** - <https://www.youtube.com/watch?v=Mh4f9AYRCZY>