



Virtual Big Room Planning and/or Program Increment Planning – Lessons Learned Panel

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DM20-0659

What do you expect from today?

You have not responded



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Meeting Conventions for Today



Please stay on mute for the lecture portion of the discussion

If you are “in” the Skype meeting via web or app, please ask questions via the Chat window.

- A facilitator will collect the questions and either pass them to the instructor if something immediate, or organize them for the Q&A portion of the course module

Those on dial in will enter questions by sending email to Crisanne (ccampus@sei.cmu.edu)

We will call for participation and discussion at various points. Please remember to come off mute before talking.

When you are done talking, before going back on mute, please say “Over” so others know you are finished.

Meet Your Team



Moderator

- SuZ Miller

Panelists

- SuZ Miller
- Judy Hwang
- Bart Hackemack
- Aaron Volkmann

Biggest Virtual Meeting Challenge

You have not responded



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Context of “Virtual Meeting” for today...



Meetings where

- Information is gathered from participants
- Discussion about the information occurs
- Decision are made about the meaning of the information
- Decisions are made about course of action (COA's)
- Actions are committed

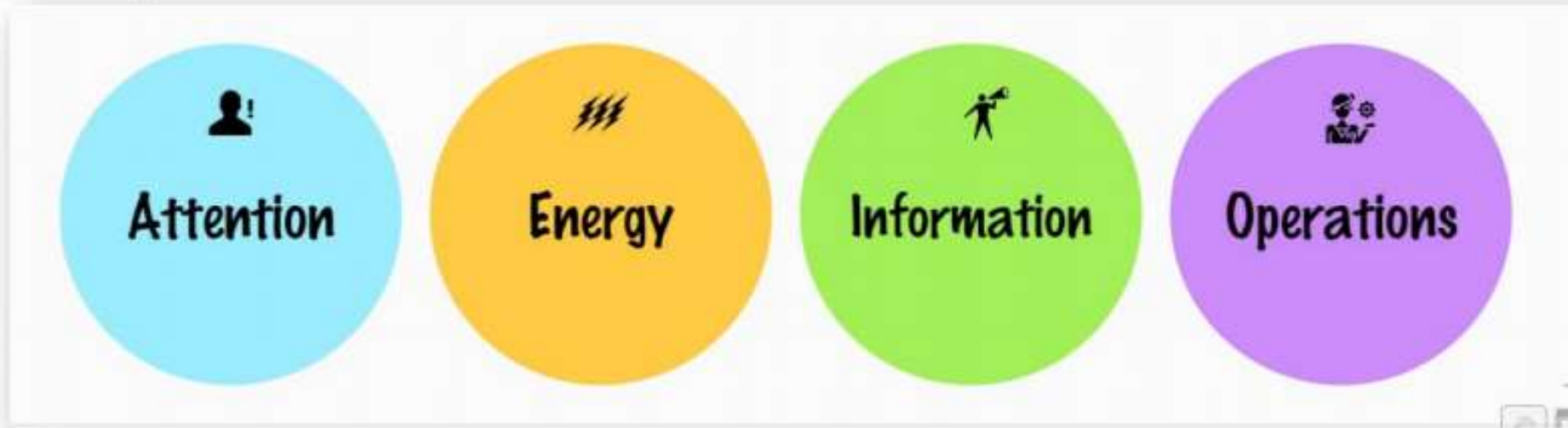
Examples

- Quarterly (PI) Planning
- Strategic Planning events
- Retrospectives
- Root Cause Analysis (*Analysis)
- Course Group Exercises

The Basic Challenge in Virtual Facilitation



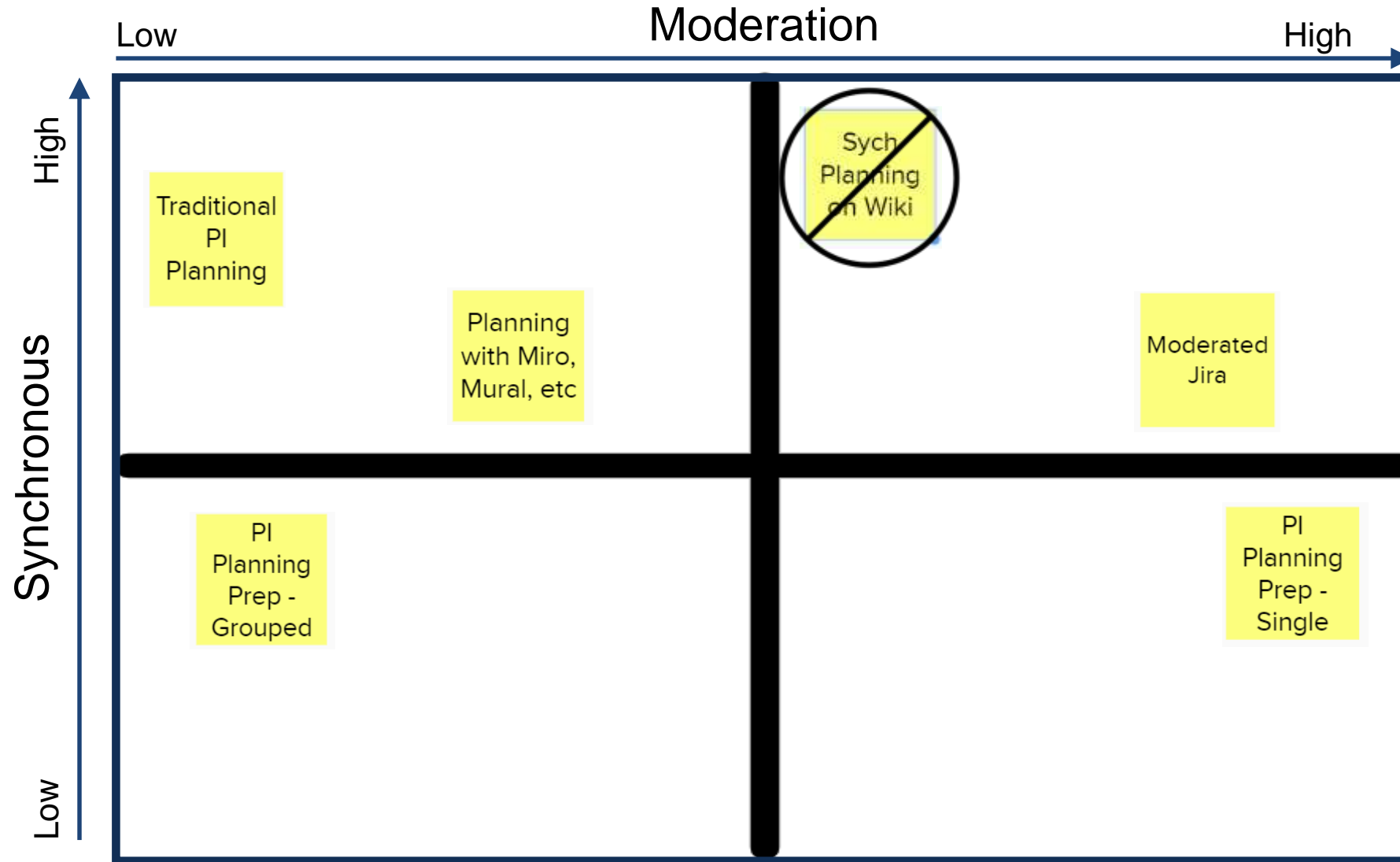
Grove Facilitation Model expresses four “flows” that are critical for managing in facilitated meetings “to do work”



How these flows are managed changes how we design and execute working meetings in virtual space



Technology Matters in Virtual Settings



In this very dynamic environment, "Preparation does not ensure success but lack of preparation guarantees failure!"

Have you participated in a Program Increment (PI) Planning Meeting?

You can respond once



No

Yes, once

Yes, 2 or 3

Yes, 4 or more



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Insights

Preparation




SAFE Refresher, Roles & Expectations

Increasing the amount of preparation upfront increases your likelihood of success.

Be clear about what the group is meeting to accomplish.

When planning the meeting, carefully and explicitly assign roles.

Do a dry run.


Share the coach's phone number


"don't assume, ask


Know the limitations of your platform


Plan Pre PI team breakouts.


Have back channels for specific purposes (leadership, facilitation, support).


Include a Producer(s) role.


Frequency of Planning-may need shorter PI Lengths when Virtual

Set up norms for how big to make screens for Jira, etc so participants can see clearly 

Detailed output/deliverable for each session 


Have a pre PI meeting (with lead time), ensure backlogs are ready and understood by all

 PI Planning Specific

Meeting Management



Multi time Zones. Plan core hours and extra days to compensate

Keep the virtual room structure as simple as possible

Keep participants accountable for the agenda. Let them know where they are and where they need to go

Create space right away for people to get their voices into the mix.

Stick to start times from agenda – even if you complete the earlier activity earlier

Expect a slow start and plan for it in your agenda.

Display the agenda when you start, when you shift segments, and when you end so people know what they should be focused on.

Make space for quiet participants to be heard.

Have an agenda, example SAFe's 2 Day PI Planner, expanded for remote.

Plan frequent activities for the attendees.



PI Planning Specific

Facilitator in each "room"

Make the agenda and updates visible and available offline as well as online

Be explicit about team breakout time and "reporting" time



Look for opportunities and methods to bring in non-contributor's ideas

Giving people a chance to say something in the beginning makes it easier for them to participate later.

Meeting Delivery...



Dealing With the Unexpected

Expect things to fall apart, because they will at times. This is not a “what if,” it is a “when.”

Always have a lower-tech backup plan.

You can't anticipate every technology variance.

Maintain calm control of the meeting no matter what happens, and convey that the situation is in hand. If you stay calm, the group will too.

Keep things moving even when the unexpected happens.

Expect phone only participants

Ground Rules



Facilitating Virtual Collaboration Workshop



Make room for frequent breaks. Time for interactions and to recover.

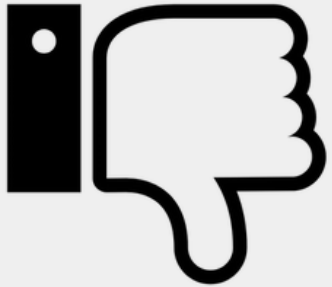
Start promptly after breaks.

Adapt the ground rules to the technology that you are using.



Have you participated in Virtual Pi Planning

You can respond once



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What are your questions?



What's been your biggest frustration with virtual meetings thus far?

Facilitator on whiteboard, stamping feature checkmark voting

Debrief – What was your experience?

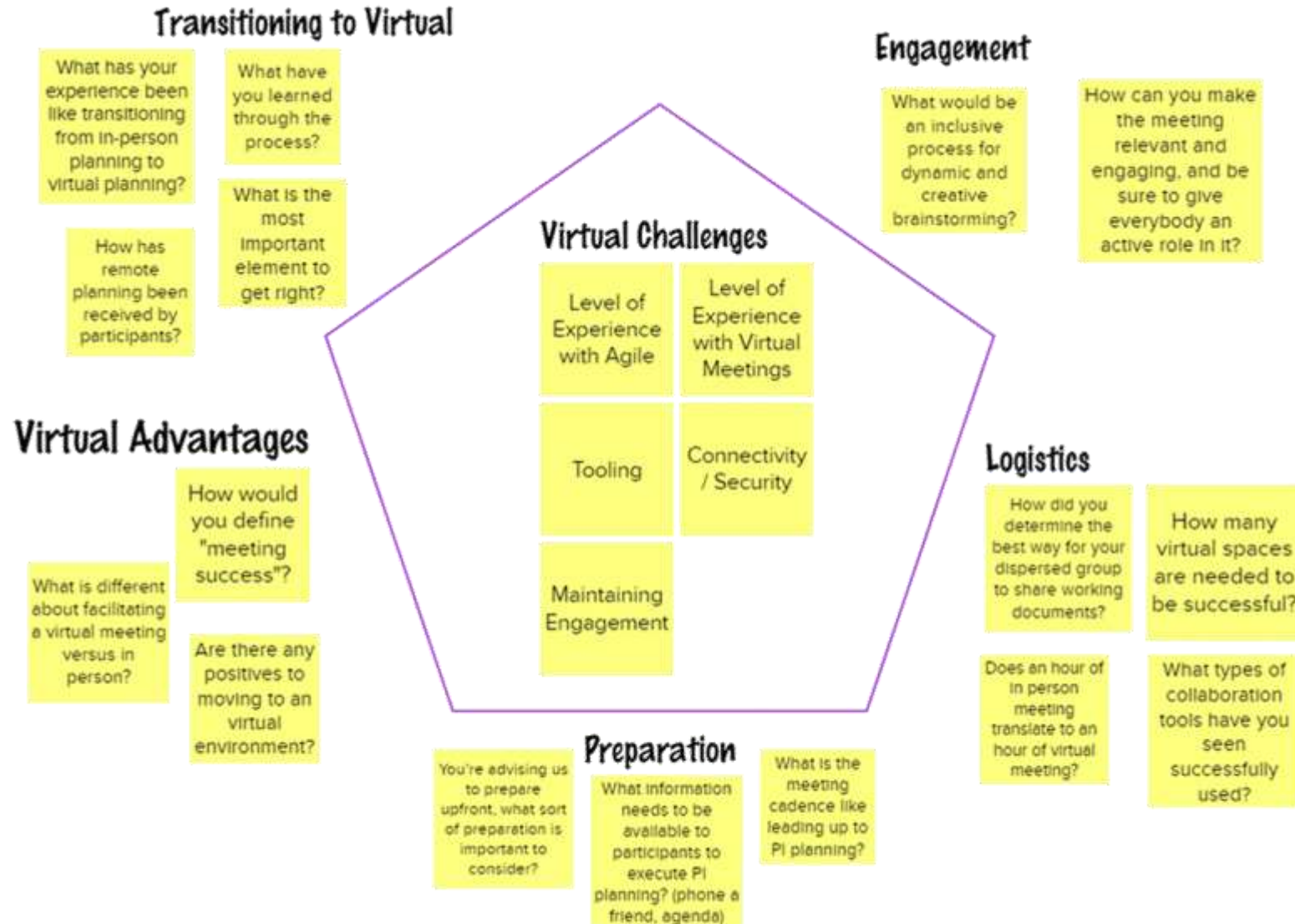
What question / issue should the panel address?

You have not responded



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Questions for the Panel



One word describing your experience with today's panel

You have not responded



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