Facilitation #FTW: A surprising tool in an Agile Transformation

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Department by department, manager by manager, requests were being made to bring collaborative facilitation to their teams. This Fortune 10 company was discovering that Agile was not just for software development. Collaborative facilitation is what opened those doors.

1. INTRODUCTION

My path to what I will call collaborative facilitation was multi-faceted. I spent over 20 years doing theatre acting and then expanded my repertoire into writing scripts and directing. Many of the skills I use as a collaborative facilitator were honed in those years of theatre. I also spent 13 years creating experiential non-profit events for the purpose of mindset shift and culture changes. In those years I learned how to help people experience something so deeply that it shifted them from the inside out. And finally I spent 10 years as a corporate IT trainer, launching computer systems all over the world which included not only training but also the process and culture shift required for lasting transformation.

All of those experiences created my unique facilitation style, which for lack of a better word I am tagging "collaborative facilitation". I am calling it that instead of just "facilitation" because I feel like I have been facilitating for years, but what I've been doing the last couple years is definitely different with much better results!
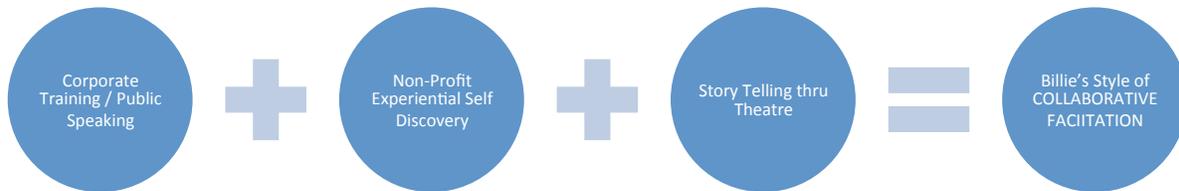
It wasn't until I took an Agile Coach Bootcamp from The Agile Coaching Institute (Lyssa Adkins, Michael Spayd and Michael Hamman) that I realized I could combine all of my experience into my own unique facilitation style, and then I discovered the corporate world really needed this style of facilitation. I've enjoyed continuing my learning with ACI and other great facilitators in the Agile community. Some of the favorites I have used in addition to ACI are presentations and books by Jean Tabaka, Diana Larsen, Esther Derby and the book titled *Facilitator's Guide to Participatory Decision Making* by Sam Kaner. I can't wait to keep growing with other experts in our community.

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In the week long Agile Coach Bootcamp, my eyes were opened to the fact that I could design a collaborative agenda and hold the space for discovery. I could interact with the people in the room by asking powerful questions and enable an open dialogue for them to find the answer for themselves. The techniques learned in the bootcamp pulled together my knowledge in the areas of training, public speaking, creating events for self-discovery and theatre to one integrated way of facilitating in an Agile environment. Suddenly I had a new way of working and I wanted to practice it right away.

That's how it all began. Thankfully I was exposed to the Agile Coach Bootcamp within a few months of joining the EPMO (Enterprise Program Management Office) which was located within the OCIO (Office of the CIO). Traditionally this group consulted on program level topics like risks, issues and governance. Luckily for me, the new management had the vision to transform the department into Agile consultants for programs with a budget of over 4 million per year. I came to work in this department after being a key influencer in the Application Development transition to Agile. Being an EPMO Agile Consultant/Coach allowed me to get the breadth of experience across so many Agile programs throughout this Fortune 10 company.

Three people from our department attended the bootcamp together. Our first step after the Agile Coach Bootcamp was to demo these skills for our internal team who wanted to transform, so they too could go out and facilitate in this new way. The people in our department loved the new facilitation techniques because it brought an open forum where they felt like their voices were heard. Leadership loved the constellation exercise specifically because it gave them a visual representation of the group opinions. I'll never forget the first time I walked into a strategy meeting and had a person in leadership say "can you do that circle thing you taught us, so we can see how we all feel about this today?"

How did it grow to the broader organization? Well, it started with our Global IT Learning Summit (GLITS) where I did a session on Agile Leadership to have them experience the collaborative facilitation exercises they could use with their teams. People loved it and said they had never experienced a collaborative session like that. Because of the conference session, this topic moved to the College Graduate group for their leadership training. And then they took it back to their teams and started requesting facilitation in their groups. The excitement over collaboration was growing.

How did all of this all connect back to the Agile Transformation? These new facilitation techniques directly connected back to the Agile principles of collaboration, individuals/interactions and responding to change. In order to enhance those Agile mindsets, these new facilitation techniques were used for as many ceremonies, meetings and workshops as we could.

2. COLLABORATION BECOME CONTAGIOUS

The more people experienced this new style of facilitated workshop, the more they realized that collaboration was going to be essential to shifting the culture and processes of this Fortune 10 company. The majority of these people were in organizations that were in supporting roles. They needed to support the Agile Application Development (AD) teams, but many of their existing processes lacked agility. Therefore, they would need to collaborate across multiple groups/departments to redesign the existing state to enable our Agile delivery programs. There is nothing better than a well facilitated workshop to help multiple groups collaborate! So this is how it became contagious. A person would be in one workshop, and then when they went back to their group, they would think of us for other needs that would benefit from facilitation. I watched as the requests moved from facilitating one-off, small meetings to multi-day, multi-site workshops through the portfolio level.

Many of these non-application development groups were not initially open to Agile. They viewed it only as a way to develop code and since they were not coding, they didn't need Agile. Unfortunately, as we all know, Agile software teams don't run as effectively when the supporting structures around them are not Agile. So now these groups were starting to feel the pressure to consolidate and make their processes leaner in order to support AD and deliver value quicker.

One of the first and most difficult collaborative facilitation requests was to design a workshop that would align 3 divisions who were all supporting groups to a key Agile delivery program. These supporting processes were becoming impediments to flow. These divisions of the company had not yet adopted Agile and were not seeing the need to change their way of working. So the goal for these workshops was to align processes between the divisions, but also to help them understand the "why" behind the requests for new, leaner processes. This was a fun workshop for me because I implemented some visual diagrams to be facilitated with lean-coffee style brainstorming, and time boxed discussion with group voting. It was also the first time some of the speakers in that room had ever experienced time-boxed facilitation where the agenda moved along at a strong pace. The sheer level of this workshop's visibility drove some pre-meeting lean process analysis, so

some of the participants came into the first workshop session with improved future plans just from prepping for the workshop. And people who had attended this workshop were so impressed with the collaborative facilitation that they requested several workshops to help them understand where their process gaps were in order to enable the leaner processes for the Agile software teams. The contagion was continuing.

One of the next opportunities was a request to help create lean throughput for some very complicated development flow with multiple suppliers into one development program. As a part of working with that program, we were also asked to facilitate a large group program retrospective. This took 50 people and gave them a voice about what they would like to change for the next program release. They had so much feedback; we needed more flip chart paper! The group overwhelmingly requested to have more retrospectives, and the facilitation exercises we used (see details below) have become a favorite within that program.

It was becoming apparent that using these collaborative facilitation techniques across all of IT could be an internal tool to enable an Agile mindset shift. After running several back-to-back sessions using these facilitation techniques, we started receiving more calls for Agile coaching. Silos within the company that had previously not been interested in Agile, were now asking questions and allowing opportunities to talk to them about this "Agile thing". Why? What had piqued their interest? The only thing that was consistent across all of these requests and shifts in interest was that there had been recent facilitation of very collaborative, productive meetings that caught their attention. If the facilitators were the EPMO *Agile* consultants, and they loved the meeting/workshop they had just experienced......then they thought that maybe they should ask more about Agile.

Department by department, executive by executive, we were being requested to teach them collaborative decision making techniques, improving individual interactions over processes and tools, and how they could better respond to change. Our company was learning that Agile was not just for software development, but for the whole organization. Collaborative facilitation is what opened some of those doors.

Maybe you are wondering what was unique about my facilitation style or how you could start some of this contagious enthusiasm in your company. Remember that I felt like I had already been facilitating events and trainings for 18 years. But something about this collaborative facilitation style was different. Let's have a look at a few things.

How is this facilitation different?
I'll use the definition of facilitation from ACI (The Agile Coaching Institute) because it has all the elements I think about as I am prepping for each meeting/workshop/event:

> *"Facilitation is a fluid process using a variety of tools, techniques, and activities to......empower participants, create clarity, invite collaboration and.........increase commitment to the solutions created by the group in order to............maximize productivity"*

My goal when I facilitate is to keep it *fluid* and moving, use a *variety of tools, techniques and activities* to increase their engagement, learning and collaboration. I ask myself *if I am empowering* the participants in the meeting; inviting them to *collaborate* and *create solutions together* with the goal of *maximizing* value, not only in this meeting but also in their day to day jobs.

Another definition I like to keep in the back of my mind as I do my collaborative facilitation style is from a book called The Facilitator's Guide to Participatory Decision Making by Sam Kaner:

> *The facilitator's mission is to support everyone to do their best thinking*

This was a different way to think about facilitation for me because the above definitions show that one of the goals is to get the people to do their best thinking and empower participants to collaborate. My aha moment was that I should basically get out of the way.

A Few Key Underlying Techniques:
Getting out of the way in order to let the participants find their natural skills of collaboration involved a few key underlying techniques. I didn't realize I had naturally assimilated these into my unique collaborative facilitation style until I recently started coaching new facilitators. I realized that one of my key differentiating skills is creating and holding the space. I learned this term from ACI, but it made so much sense to me because of my public speaking and theatre experience. You have to own the role you are in, and act as a servant leader

in that role by holding the space for the room or the audience. I'm sure it goes much deeper than this and I can't wait to learn more and increase my skill with this concept. But as I am working with beginning Agile facilitators, I am seeing this is not even on their radar, so I do my best to explain the concept. I especially thank Lyssa Adkins, Michael Spayd and Michael Hamman (ACI) for opening me to the concept of holding the space as a facilitator and modeling it so effectively in their sessions.

Another key skill I am trying to pass on is to really spend time designing and planning out the event. Designing a great flow of exercises is a bit of an art. And like any art, we all are kind of rough at something we've never done before. But with time, it becomes quite easy to know what exercises will go well together. My goal with many of my designs is for them to not even know we have experienced multiple facilitation techniques because the flow was natural and resulted in greater and greater collaboration throughout the time spent together. Think of something with a "build". Like many of the great dramas and stories we know, there is a build in the story. The flow of a collaborative meeting agenda will be similar. ACI's training had a great template to use as a facilitation guide.

A key is to practice any games or active learning techniques you might be bringing in as a facilitator. In my previous 13 years of designing experiential events, I learned through failures and mis-haps that you had to really think through the interactions and responses of the participants. In order to prep, I had to look at all the different personality types/people and try to understand the experience from their perspective. It is very important to put yourself in their shoes as a facilitator so that you don't get blindsided (as much) in the actual event. Plan to have small pre-meetings with key people; run the exercises and games with a small internal group before you facilitate it for a larger group. There are so many key skills, I really encourage everyone to take some of the great classes out there and read as many books as possible.

A few techniques that have become my go to in the last couple years are listed below. I'll elaborate on the exercises more in my presentation at Agile 2016 and I have included useful links to resources in the appendix.

- Tribes and Constellations
- Silent brainstorming and mind mapping to allow all voices to be heard
- Voting/Prioritizing using collaborative techniques
- Speedboat and other creative exercises from Innovation Games website
- Lean Coffee facilitation concepts of collaborative agenda creation and timed discussions with voting (I've expanded these into many types of meetings)
- Rotating Flip Charts
- ROTI: Return on Time Invested

3. EXAMPLE OF FACILITATION DESIGN

The flow of the event is very important. Remember there is no perfect agenda. I suggest experimenting as much as possible so you can learn how the room reacts and how a certain exercise can change the entire feel of the meeting/workshop.

Let's look at agenda flow by reviewing an agenda for a special program level retrospective with about 50 people. I felt this one was particularly transformative for these teams and led to many more months of Agile coaching and transformation on a larger scale.

Goal of the meeting:
The new leadership wanted to hear from the teams about what could be changed to make the next Release more successful.

Why was this an opportunity for transformation?
This program, like so many programs, had gotten thrown into the whirlwind of delivery with fixed dates and pressures. Although the desire to use Agile practices and mindsets was there, the pace of the work unfortunately didn't encourage it. We've all been there, and we get it. At the time of this retrospective, there were no Agile Coaches engaged with this program. So when the new management wanted to hear from the teams in an Agile retrospective, of course this was an opportunity for transformation. This was giving direct access to 50 people to experience collaboration, interacting together as individuals, and responding to change for the next release. It directly aligned with the goals for Agile transformation.

Thought Processes/Design of the Agenda:
Deliberately designing this retrospective workshop agenda allowed us to focus on several desired outcomes:
Create a direct opportunity for the voices of the teams to be heard
Provide a clear channel for them to prioritize their improvement needs for the next Release
Get to know each other across teams
Build trust and safety to share honestly
Enable transparency

A summary of the thought processes behind this agenda design:
The first couple activities would warm the teams up and provide a visual feedback mechanism without conflict. As the trust level among the participants grew, they would be more open to writing their honest, transparent retrospective comments in small groups. By the end of the workshop, as they became empowered, they would end by prioritizing their needs as a large group.

You can see the desired progression of empowerment and transparency. A well designed agenda is fluid so they barely know they are following any rules of engagement during the exercises. If I had jumped directly into "tell me right now what you need in the next 3 months", it probably would have been a very dismal outcome.

The Facilitation Agenda Flow:
"**Tribes**" exercise was the start and it was used to build rapport (Please see the appendix for example questions used during the Tribes exercise).

Another opener I've used for building rapport is any type of picture cards, where everyone chooses a picture and explains why they chose this. A fun story from this exercise is that someone on the team had "run with the bulls" in Barcelona! You should have seen how impressed the rest of the team was. That sort of fun doesn't normally come out in day to day conversation.

"**Constellations**" exercise was next allowing silent expression of opinion (Links to resources from Lyssa Adkins that explain constellations are in the appendix).

"**Silent Brainstorming**" in small groups in the retrospective portion to build on the trust that was gained in the Constellation exercise.

"**Rotating Flip charts**" allowed the whole group to see what other groups had put on their small group retrospective boards.

Small Group Prioritization/Voting allowed each group to express their top desire for change in the next release.

Large group prioritization via a grid outlining "Impact to the Team" (Low to High) and "Ability to Fix" (Low to High). We gathered back together as a large room and had each team place their #1 recommendation on the grid as a visual radiator.

"**ROTI**" (Return on Time Invested) was used to express if the team thought the1.5 hours spent in the program level retrospective was worth it. The scale was 0 (No value) to 4 (high value). The majority of the feedback was in 3 or 4, and all of the sticky notes in the 2 category were because they wanted MORE time!

Observations/Effects:
By designing a collaborative agenda, I saw the people come alive. I saw their boldness grow once they realized this was a safe setting to express their opinions. That is another key role of the facilitator…..keeping the environment safe for self-expression. It's a skill I've worked hard on learning to say "thank you for sharing" and not allow the cross talk. What I've seen in the participants is that the first controversial thing they voice to the larger group…..their body language is ready for the attack back. They are tough skinned and say it politically correctly expecting someone else to talk back or challenge what they just said. When I, the facilitator, keep the room in check and show appreciation for the self-expression, I see the person soften just a tiny bit. And then bit by bit, over the course of the session, I can see them take flight into the freedom to speak their needs and opinions without getting beaten back down. The facilitator holds the space for people to take flight into transparency.

One of my greatest joys seen in this program was that the people really started taking the transformation as their empowered responsibility. It stopped being a thing management was doing, or the company was doing. A spark had been ignited in them. They started scheduling their own retrospectives and their own agendas. I really enjoyed seeing their energy and empowered actions in the months that followed

4. SUMMARY

In my years as a professional trainer I was never asked by an executive if I would teach them how to do collaborative decision-making techniques. I was never called by a corporate manager who wanted to run better meetings and asked, "*How do I design an agenda that makes this collaborative and helps me to hear all the voices on my team?*" I was getting calls at least once a week to enable people with facilitation techniques or to help them design collaborative agendas that contain these exercises. This transformation was part of the Agile culture transformation. It may not have been implementing Agile software development techniques but it was changing the culture with the Agile principles of Individuals/Interaction, Collaboration and Responding to Change. If we can move the needle on the way people approach decision-making or the way they collaborate as a portfolio/team, then I think we've made impactful progress towards the Agile mindset shift in an organization as a whole.

5. ACKNOWLEDGEMENTS

I'd like to honor Jean Tabaka for her incredible contributions to this topic and bringing collaboration into the forefront in our community. Thank you to The Agile Coaching Institute and Lyssa Adkins, Michael Spayd and Michael Hamman for the important part The Agile Coach Bootcamp played in my growth as a facilitator. I'm thankful to Andy Brown for his influence on my agile growth and first exposure to the Agile Coach Bootcamp. I'd also like to acknowledge Amy Palazzolo and Ghida Choukair for giving me freedom in my day to day job and trusting me as I brought some crazy concepts. And so many thanks go to Nanette Brown, my shepherd for this experience report. Her guidance was invaluable!

REFERENCES

Adkins, Lyssa "Coaching Agile Teams" Addison-Wesley, 2010
Derby, Esther and Larsen, Diana "Agile Retrospectives: Making Good Teams Great" Pragmatic Bookshelf, 2006
Kaner, Sam "Facilitator's Guide to Participatory Decision Making" Jossey-Bass Business & Management Series 3rd Edition, 2014
Tabaka, Jean "Collaboration Explained: Facilitation Skills for Software Project Leaders (Agile Software Development Series)" Addison-Wesley, 2006
Agile Coaching Institute: http://www.agilecoachinginstitute.com/agile-coach-bootcamp/

APPENDIX
Constellation:
Informal Constellations is an ORSC tool (Organization & Relationship Systems Coaching) developed by CRR Global Inc. co-founders Marita Fridjhon and Faith Fuller.

Constellations is documented in the following online locations:
Lyssa Adkins Examples of Questions Coaching Agile Teams website:
http://www.coachingagileteams.com/2009/08/30/agile/agile-team-start-up/attachment/constellation-exercise/
Lyssa Adkins Agile 2015 Conference PowerPoint:
https://submissions.agilealliance.org/system/attachments/attachments/000/001/657/original/2015-08_Agile_2015_Informal_Constellations.pdf?1438849911
Lyssa Adkins Agile 2015 Conference Step by Step Guide:
https://submissions.agilealliance.org/system/attachments/attachments/000/001/658/original/Adkins_-_print_120_double_sided_-_Step-by-Step_Informal_Constellations_-_Agile_2015.pdf?1438849935

Tribes:
Tribes was also learned in the Agile Coach Bootcamp by the Agile Coaching Institute.
Not documented online but below are some example statements I use when I facilitate it. Obviously it needs to be demonstrated by the facilitator and after the facilitator throws out a couple sentences, I like to open up the floor for the participants to take it from there. If no one jumps in, then I have a couple "plants" in the circle that I prepped with questions to get the flow moving.
Example Questions:
- I love kayaking in the summer
- Attending a live football game is the best
- Playing with my grandkids is something I love

Silent Brainstorming:
http://www.coachingagileteams.com/2010/11/29/uncategorized/using-silent-work-techniques-to-get-to-astonishing-results/

Rotating Flipcharts:
Technique learned in Agile Coach Bootcamp. Also partially documented here http://www.iaf-methods.org/node/5104

Return on Time Invested:
I got this technique from a YouTube video (https://www.youtube.com/watch?v=qqtPZYigfNI) of Diana Larsen and Esther Derby in 2007.
The book would be:
Derby, Esther and Larsen, Diana "Agile Retrospectives: Making Good Teams Great" Pragmatic Bookshelf, 2006