Creating a Dojo Dashboard to Visualize & Measure Organizational Learning

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Objective

In this workshop, Agile2017 attendees will simulate a methodology to surface and prioritize individual and/or team learning needs. Participants will then work with peer mentors to create actionable learning plans to support "dojo style" learning activities. Participants will experience how learning need & learning plan data surfaced in this workshop can guide effective peer-to-peer learning/mentoring and can be used to create a "dojo dashboard" intended to direct focus to learning activities, identify common learning needs and learning plans to establish "dojo belts", and most importantly acknowledge and celebrate learning achievements as they occur.

Step 1 – Review Retrospective Challenges

- Individually think back to your most recent team retrospectives, what is holding your team back - write several items down on Post-It notes (1 item per Post-It note) – be prepared to share with others at your table.

Step 2 – Capture Learning Needs

- Form a small group at your table (2 – 4 people), discuss the challenges you captured and decide if there are common challenges that can be addressed by learning something.
- Working in your small group, discuss & complete a "Learning Need" worksheet for each learning need you identify.
- As you complete a "Learning Need" worksheet, you will specify:
    - o Topic – a short topic (word or several words) that represents the general focus of the learning
    - o Question / Learning Goal – a question or specific goal that you are trying to address via learning
    - o Why / Impact – Why do you (or your team) need to learn about this topic? What is the impact of this learning?
    - o Success Criteria – How will you know you have been successful in learning about this topic?
    - o Participants – Who identified this learning need and will benefit from it?
- Capturing learning needs is a time-boxed activity – each small group should complete as many "Learning Need" worksheets as possible in the time allocated.

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Step 3 – Prioritize Learning Needs
- At each table, small groups will share the learning needs they have captured and each table will discuss and prioritize the learning needs surfaced at their table.
- As tables discuss, learning needs should be ranked (top to bottom) on the table in order of impact.
- When priority has been established of learning needs at each table, please indicate ranked priority by number (1, 2, 3, …) – 1 = Highest priority learning need

Step 4 – Identify and Connect with a Mentor
- At each table, identify several people at the table (ideally 1/3 of the people at the table) that will serve as mentors – serving as a mentor, these people will leave their original table and go find another table where they can help that table with a documented learning need.
- When prompted, everyone will stand up, and mentors will begin to circulate.
- When a mentor identifies a learning need that they can help with at another table, the mentor will join that table, and everyone at that table will sit down.
- Mentor pairing options:
  o For large tables (8-10 people), consider dividing the table into two groups, and then having 2 mentors join the table to focus on 2 different learning needs.
  o It is recommended (if possible) that tables can have more than 1 mentor join them to support discussion on a single learning need.
  o The intent of mentor pairing is that all tables have at least 1 mentor with them that is able to discuss one of the table's learning needs – you will know this has occurred as all tables will have sat down.

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Step 5 – Create a Learning Plan for a Prioritized Need

- Working with their mentor, the mentor and table members will now create a step-by-step learning plan to support the selected learning need.
- Via discussion with the mentor(s), complete the "learning plan" worksheet to establish a step-by-step learning plan.
- While completing the learning plan worksheet, you will capture specific learning activities, the intended outcome of each activity, and who will be involved with the activity (members of the team, the mentor, specific coaches, company resources, community/industry resources, etc).
- If necessary, use multiple "learning plan" worksheets to capture all of the learning activities necessary for a learning need.
- A learning plan is intended to provide high-level guidance, rather than specific details – hence the learning plan should provide "directions" (think Google Maps) on what to do and then how to assess if you are on track – by going on this journey (follow the directions), you'll experience things that support the learning need.
- For mentors, think about how you have learned specific knowledge / skills, can you recall the journey / activities you went on.

- Learning plan tips:
  - Try to identify learning tasks that can be done quickly (few hours vs. days) – recall agile is all about fast feedback.
  - If a learning need requires many activities (multiple sheets) is there an opportunity to re-scope the learning need to be smaller and faster to achieve – learning needs can be split the same way user stories are split to enable faster feedback and mastery of fundamental skills.
  - Include activities that promote mastery & practice – once I learn about that skill / pattern, I'm going to do a Spike to try and include it in some code, etc.
  - To sustain motivation, can you link the expected outcomes from each learning activity back to the intended impact of the learning need – how does learning this new component of a platform help our team improve?
  - Learning plan creation is intended to be a marketplace – if your group gets stuck, send someone to find help (borrow a person from another table for a few minutes, not the mentor, and you'll be amazed that a new set of eyes, can help get things rolling).
  - Learning plan creation is time-boxed – a chime will be provided as the end of the time box approaches, to wrap up initial ideas – if learning plans are completely, flushed out, participants and mentors can reconnect after the workshop to flush out remaining details as needed – the intent of this method is to establish initial plans and momentum to start working towards learning needs.
- Additional Learning Plans – as time allows, new mentors could be identified or existing mentors could swap to move to other tables, and then select another learning need and create another learning plan.

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Step 6 – Share Learning Activities via a Dojo Dashboard

- Data captured thus far (learning needs and learning plans) provides the foundation to create a dojo dashboard to visualize and measure learning – this dashboard can be created a physical dashboard (learning wall) and/or an online dashboard.

Physical Dashboard
- o Collect the learning need and learning plan worksheets created in this workshop to create a wall gallery.
- o Hold a weekly ceremony where all gather at the wall and mark off / celebrate completed learning plan activities and learning needs completed each week.
- o A recurring ceremony to update the dashboard is recommended as this allows team members to share key insights and impacts of their learning with others.
- o As necessary, hold additional dojo workshops to reprioritize learning needs and create learning plans as new learning needs arise.

Online Dashboard
- o Configure an agile lifecycle management tool (ALM) to support a simple 2-level hierarchy consisting of "Learning Needs" (aka Epics) and "Learning Plan Activities" (aka Stories within an Epic).
- o Once configured, all data surfaced via this workshop can be entered and then learning activities tracked online.
- o While an online dashboard can easily generate graphs & charts of learning, offers search features, tracks linkages between learning activities and completion of specific user stories / epics (interesting data to assess learning of specific tech skills or architecture), it lacks some of the intrinsic motivation and energy created by people gathering around a physical wall to celebrate and discuss their items learned.

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Sustaining a Culture of Learning

- Recall this methodology to establish a dojo dashboard began with retrospective data - greater intrinsic motivation to complete learning activities is achieved by linking learning needs to team improvements. Such linkage also allows the impacts of learning to be linked traced to team improvements – if we see positive progress on the dojo dashboard, we should assess if other team metrics improve as a result of the team's learning.

- This methodology is intended to provide focus and measurement criteria to other practices that encourage team learning & improvement – specifically "Learning Hour", a practice advocated for by Llewellyn Falco, gives teams 1-hour a day for learning to improve their craft – a dojo dashboard can serve as an accountability mechanism to ensure there is focus & measurable benefit on necessary learning activities during such practices.

- Creation of a dojo dashboard surfaces significant data for which review/analysis is recommended to identify the following:

  - **Unaddressed Learning Needs** - High priority learning needs that cannot be addressed by team members themselves – such needs can be used to engage other mentors / coaches (internal / external) with the necessary knowledge / skills to support necessary learning.

  - **Common Learning Needs and Trends Seen Across Multiple Teams** – as learning plans are created for common needs, this information can support establishing dojo belts and common learning plans to enable teams to self-service some of their learning needs (ex: a team can identify a standard learning plan for a common learning need created by others from the dojo dashboard and begin to make progress without the need to engage a mentor to create a unique plan).

  - **Knowledge & Skills Distribution throughout the Organization** - The dojo dashboard will track teams and individuals who achieve greater skill by completing learning goals – this information can be used by management to coach/guide career development of additional mentors on specific knowledge & skills within the organization and to distribute people throughout the organization so there is a healthy balance of knowledge and skills on all teams / projects.

Observations / Notes: