

“Deal Me In” – Facilitation Guide

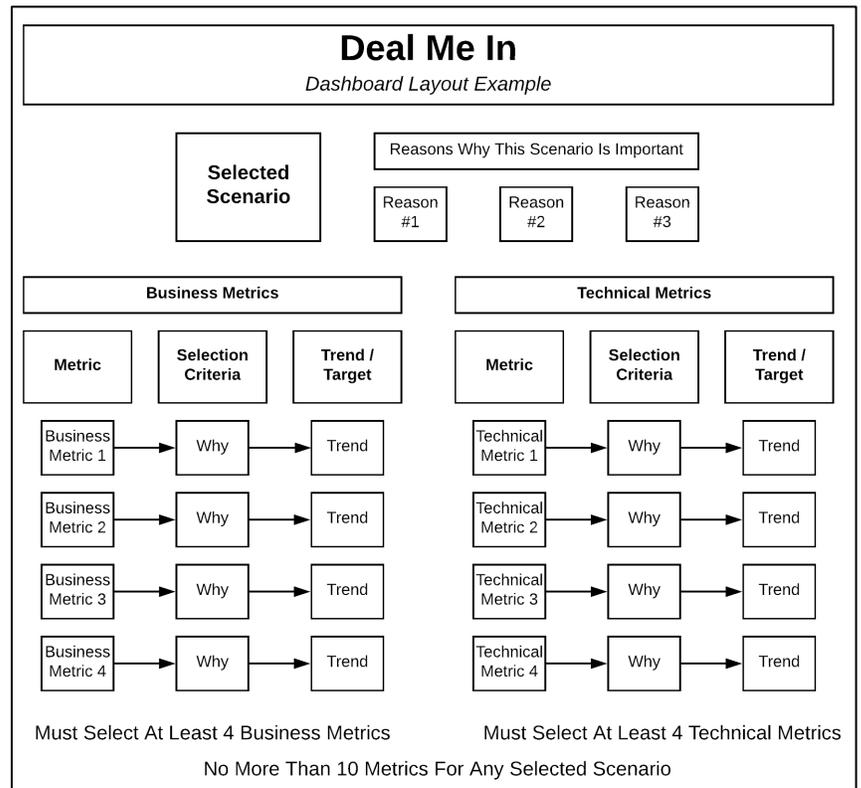
Collaborating to Design a Simple Dashboard for a Specific Scenario



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Session Intent

“Deal Me In” is a collaboration framework by which a group works together to design a simple dashboard to measure a specific scenario. The act of working together to discuss the scenario and then design the dashboard to measure the scenario promotes creating a shared understanding of what the scenario is, why the scenario matters to the business and what each metric means that is used to assess the scenario. The framework forces groups to keep dashboards simple by guiding the selection and prioritization of a limited number of metrics (no more than 10) and to balance the selection of metrics to assess both business & technical factors. Once metrics are selected and prioritized, groups debrief the activity by capturing and writing the reasons for which specific metrics were



selected and if there are specific trends or targets to monitor within each metric. When complete, the resulting conceptual dashboard can be posted and/or captured via a photograph to promote continued understanding of how success is being measured. It is also typical that the conceptual dashboard can be instrumented in a dashboard tool if connected to the necessary systems and/or APIs to provide data.

What problem does this framework solve

Many organizations experience thrashing, conflict and/or lack of alignment due to poor measurement practices. Some organizations do not measure enough (no dashboards) or some organizations have dashboards so complex that they are only understood by the people who created them. “Deal Me In” is intended to guide a conversation to enable design and share understanding of a simple dashboard that provide enough just enough data to guide high-level inspection / assessment of a specific scenario.

Session Outcomes

By participating in a “Deal Me In” session, all participants will achieve:

- Clarity and understanding of the scenario that is being measured
- Understanding of the metrics used to the scenario and what each metric means
- Awareness of the criteria for which each metric was selected & prioritized
- Awareness of any trends or specific targets to monitor within selected metrics
- A conceptual dashboard design that can be easily capture / communicated by posted or taking a picture
- A conceptual dashboard design that can be instrumented in a dashboard tool with data feeds

A complete “Deal Me In” session should generate a conceptual dashboard similar to the diagram shown above.



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How to Facilitate – A full “Deal Me In” session for specific scenario requires 2-3 hours to facilitate.

Step 1 – Select a Scenario for Measurement

- Use the provided scenario cards or brainstorm and capture your own scenario.
- Discuss and write down the reasons why this scenario is important.

Step 2 – Identify Metrics for the Scenario

- Use the provided metrics cards to select metrics within the following parameters:
 - No more than 10 metrics in total
 - At least 4 metrics must be business focused
 - At least 4 metrics must be technically focused
- You can write in your own metrics if you don’t want to use the cards.
- Organize selected metrics into a column for “Business” and a column for “Technical”.

Step 3 – Prioritize the Metrics

- Review the metrics you have selected in each column, decide on the priority of metrics.
- The highest priority metrics in each column should be near the top.

Step 4 – Capture Reasons Why

- For each selected & prioritized metric, discuss and write down the reasons why you selected each metric.
- Ideally you are able to capture multiple reasons for each metric.

Step 5 – Discuss & Capture Trends or Targets

- For each selected & prioritized metric, discuss and write down if there is a desired trend or target for the scenario being measured.
- Write down these trends / targets and post them next to the reasons why each metric was selected.

Step 6 – Capture The Output

- Review the selected metrics, reasons why and targets / trends to ensure all information is clear.
- Capture a photograph of the resulting dashboard to help you recall the metrics being used to assess the scenario, the reasons they were selected, and targets or trends to be mindful of when viewing the dashboard.

Facilitation Options

“Deal Me In” can be paired with many facilitation structures / activities to complete the prior steps – consider using any of the following:

- Round Robin Discussion – all participants cycle through taking turns where one person plays or adjusts cards and/or shares their reasons why at a time.
- Roll A Die – assign all players a number, then roll a die to determine who gets to play / share next – when rolling a die monitor participation to ensure that everyone gets a chance to participate even if using a random mechanism (rolling the die) to determine player order.
- Liberating Structures (such as 1/2/4/All) – a collection of facilitation activities that guide collaboration from individuals to full groups – see www.liberatingstructures.com for more information.

Additional Information

Additional information on “Deal Me In” and templates to print & cut your own metric & scenario cards are available at: www.theagilefactor.com/deal-me-in

