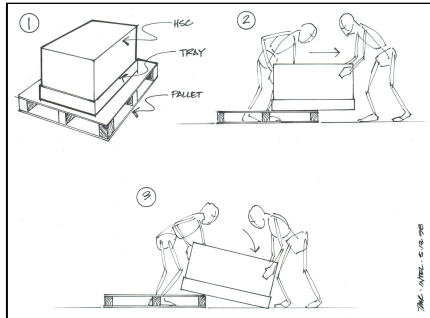
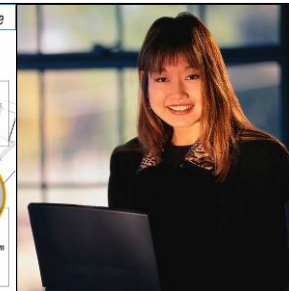
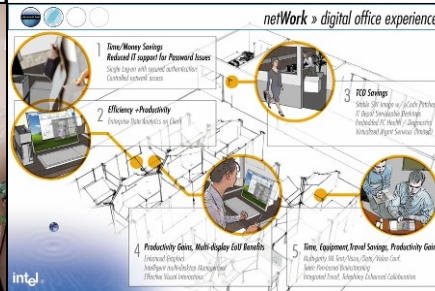


# The Power of Retrospectives: Applying Learned Wisdom in Teams



| Requirement                | Outstanding | Target | Minimum |
|----------------------------|-------------|--------|---------|
| Schedule                   | WW27        | WW29   | WW31    |
| Cost                       | \$1.00      | \$1.00 | \$1.00  |
| CPU load at full operation | 20%         | 20%    | 25%     |



| Use Case ID            | RK_Web_Download  |
|------------------------|--|
| Title                  | Install Client Adapter – web download  |
| Summary                | Actor downloads latest web pack to perform fresh install or driver update on one or more systems.  |
| Actors                 | End user, IT person  |
| Pre-conditions         | <ul style="list-style-type: none"> <li>Wired product, single NIC</li> <li>Windows versions 2000, XP and 2003</li> <li>Add as note: Web packs vary according to user needs and download capability</li> </ul>   |
| Basic course of events | <ol style="list-style-type: none"> <li>User selects package from web. One pack needs to contain options as in RK Install Autorun.</li> <li>User downloads file to drive, local or remote.</li> <li>User executes file which requests confirmation of license agreement</li> <li>If user does not accept license agreement then execution is terminated. Web download is left on system.</li> <li>If user accepts license, files are extracted and installation proceeds according to type of pack – see Web Pack Use Cases.</li> </ol> |

# Intel - Background

**Company Size & Distribution:** ~65,000 employees, 290 locations in 45 countries.

**Company Organization:** Emphasizes autonomy, no single place to intercept all product development. Recent survey showed 64% of employees work on three or more teams simultaneously

**Company Philosophy & Culture:** Fast –paced, focused, intense, and entrepreneurial company. Six values: customer orientation, discipline, quality, risk taking, great place to work, and results oriented.

**Product Scope & Size:** 450+ products and services

**Retrospective Methodology Adoption:** Since 2003, Debra has delivered over 200 project and milestone retrospectives. In 2008, we have over 100 facilitators in training, delivering over 15 retrospectives each quarter.

**Organizational Learning:** Capability fully supported with two full time heads.



# Organizational Learning

## Vision:

A positive **learning culture** supported by the appropriate level of structure, learning behaviors, methods, and tools.

## Mission:

- **Retrospectives:**
  - Share wisdom to accelerate learning across Intel
- **Organizational Learning:**
  - Develop, deploy and maintain an **integrated** repository which will:
    - Capture Learnings
    - Manage Action Plans
    - Share Key learnings

**Key point:** Re-use solutions and stop repetitive mistakes across the organization

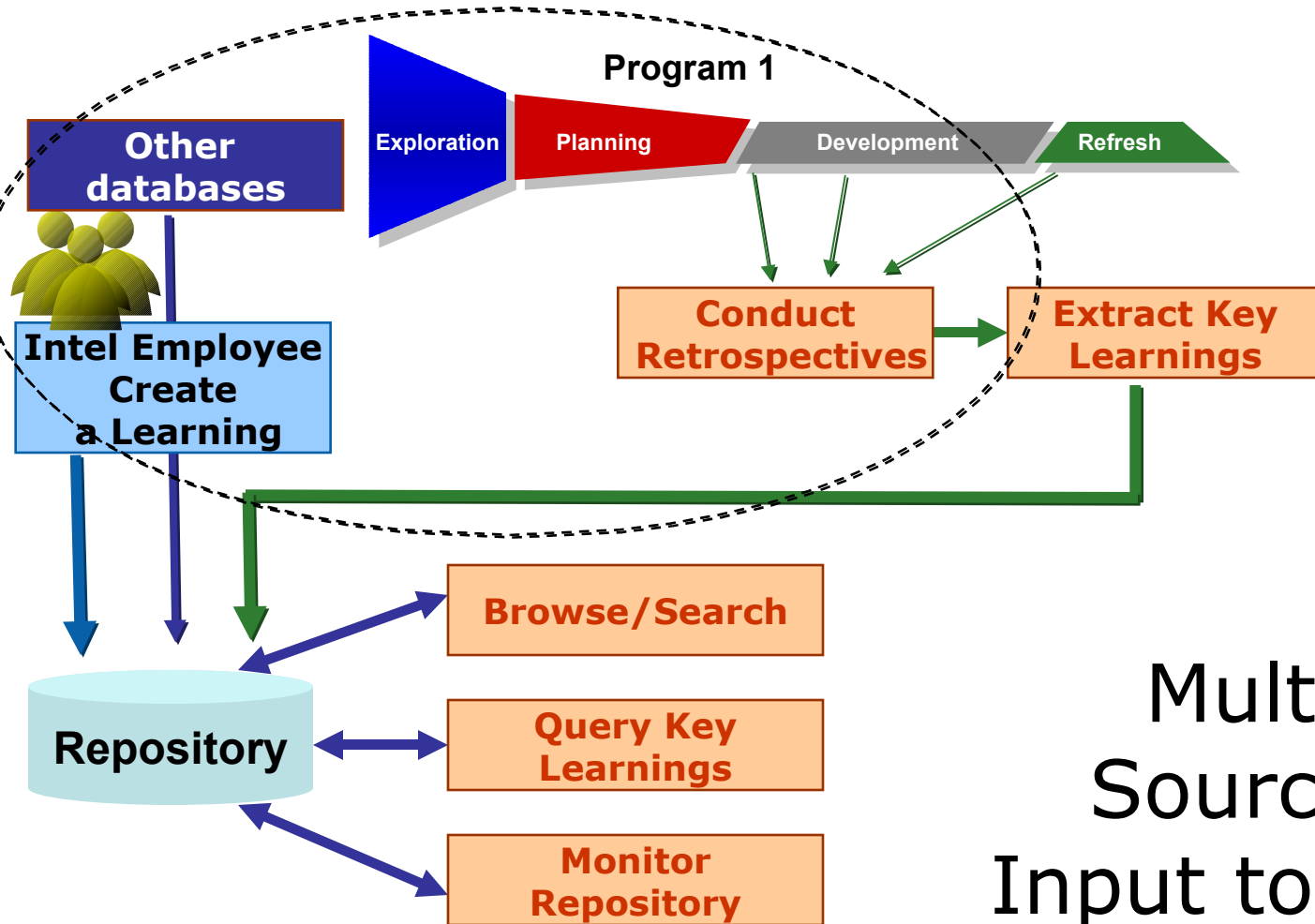
# Retrospective is a *methodology* that...

1. Supports a positive and productive team environment
  - Identify and reinforce what is working
  - Learn what needs to change or improve
  - Collaborate to develop specific action plans
2. Scalable to the complexity of the program and experience of team members
  - Occurs at ~3 strategic points across the program lifecycle
  - Variety of process options adapt to the needs of the program
3. Creates a constructive learning environment for feedback
  - It is led by a trained, objective facilitator
  - Focus on reinforcing the good and positively correcting what needs to be improved

# What Makes a Retrospective Different?

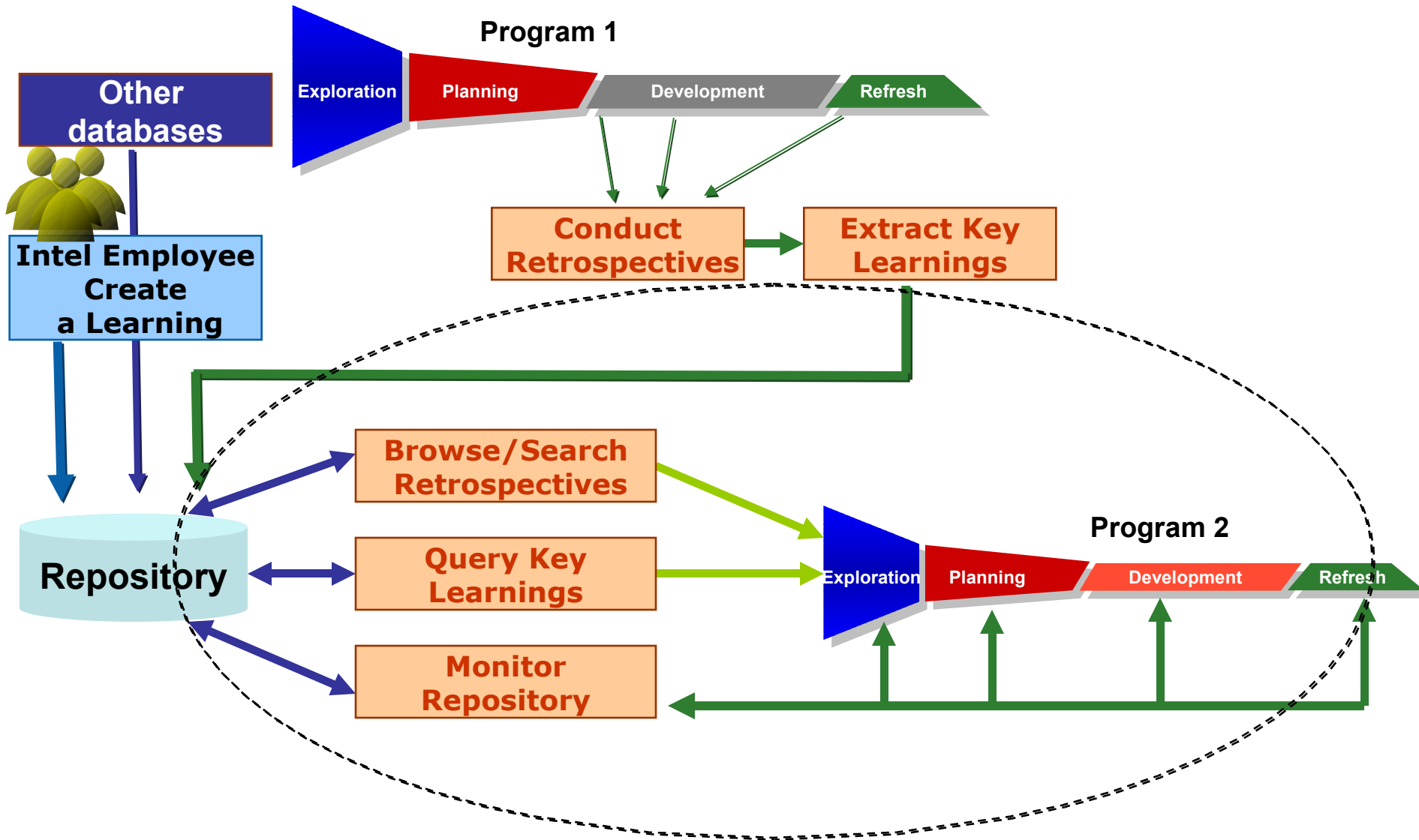
| Common Review Practice  | Retrospective   |
|---|---|
| Conducted only at the end of the project.   | Conducted at three (or more) strategic milestones during the program lifecycle                                    |
| Not applicable to other projects  | Content captured in a way so it can be used to benefit other projects   |
| Key learnings not translated into specific plans for change   | Action Plans created to improve the effectiveness and efficiency of the team                                      |
| No process defined that keeps the discussions constructive (breaks down teamwork & creates “silos”) | Discussions are constructive & focus on the opportunity to learn and improve (fosters teamwork & team capability) |
| Led by a team member (with a possible “agenda”)   | Led by an objective and neutral, skilled Facilitator (bring in a third party if needed)                           |
| No follow-up (meeting not documented; no meaningful process improvement)                            | Results tracked (meeting documented, results available in a central repository, process improvements implemented) |

# Changing Human Behavior – Concept Diagram

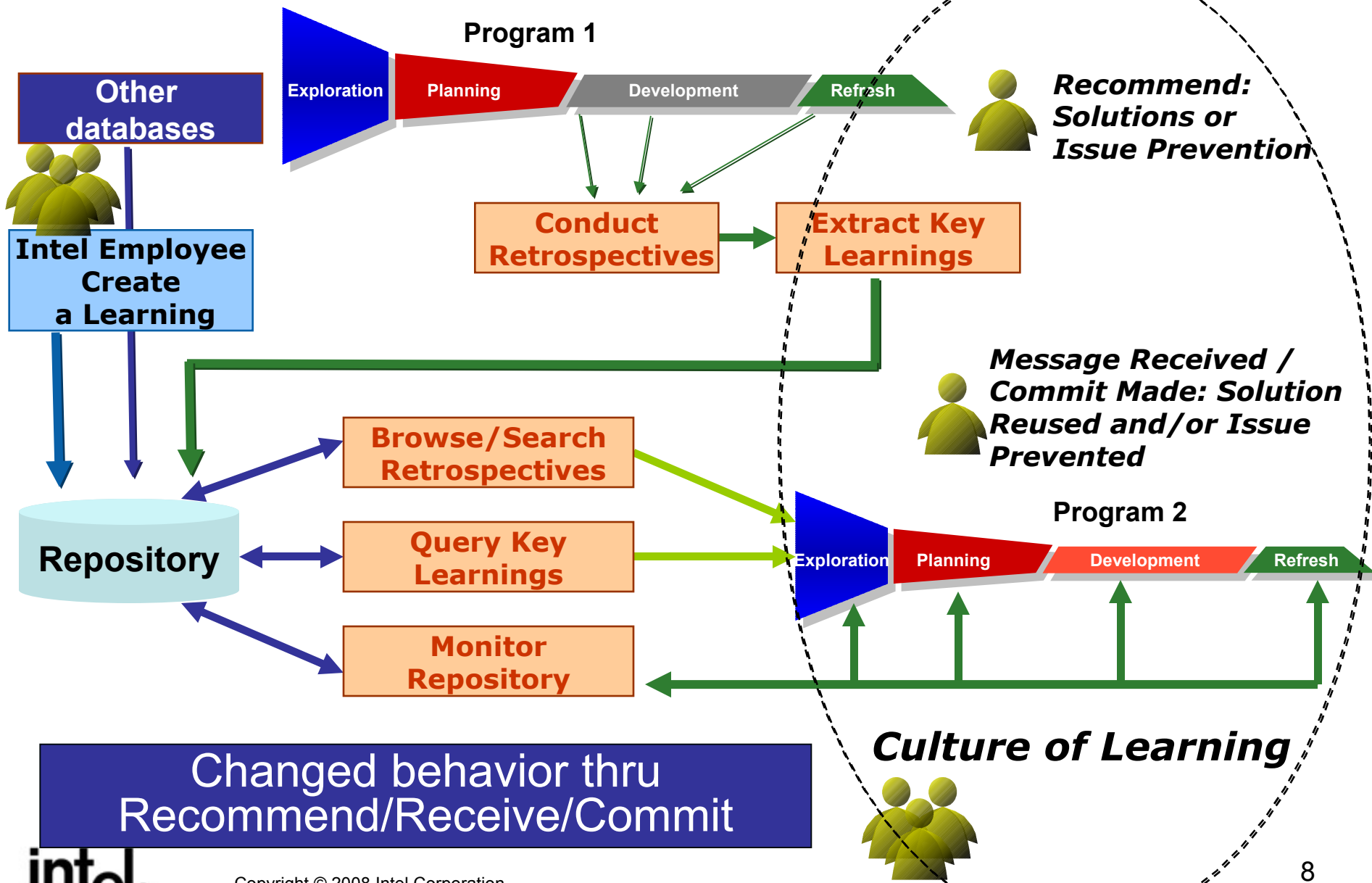


Multiple Sources of Input to build a Robust Dataset

# Changing Human Behavior – Concept Diagram



# Changing Human Behavior – Concept Diagram



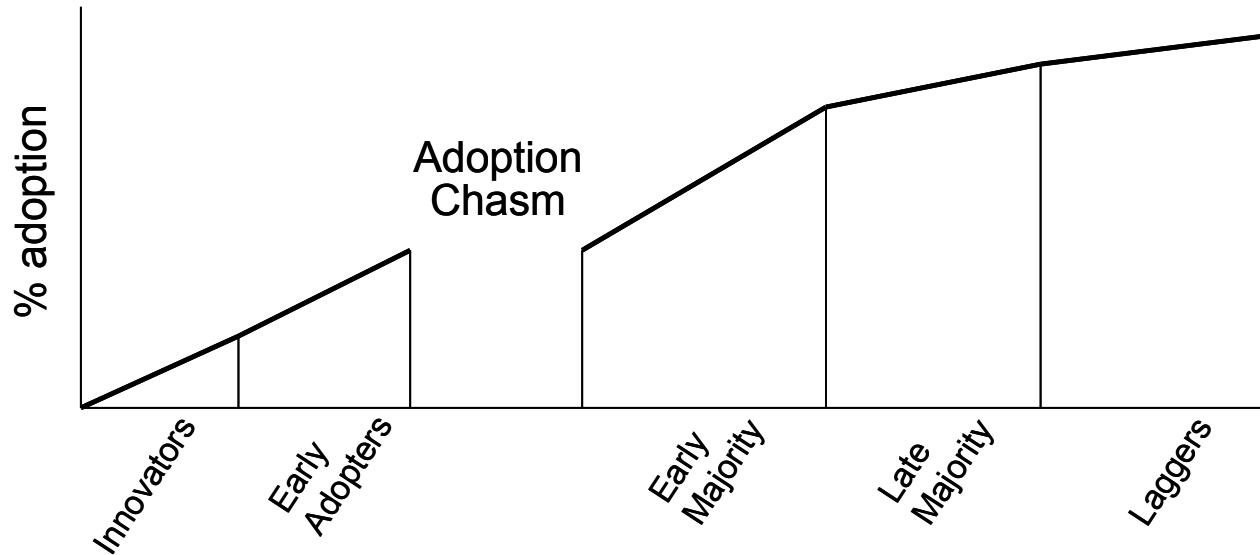
# Key Message: It's Working

- Adoption of new way of doing things
  - Not just at the end of a program, this was a change
  - Retrospectives are customized with collaborative activities
    - Face-to-face is preferred
    - Virtual is becoming more common
    - Team determines what is important to fix
- Management of new deliverables
  - Action Plan with problem statement, solution, owners and due dates
  - iMBOs
  - Progress is tracked

# Key Message: It's Working

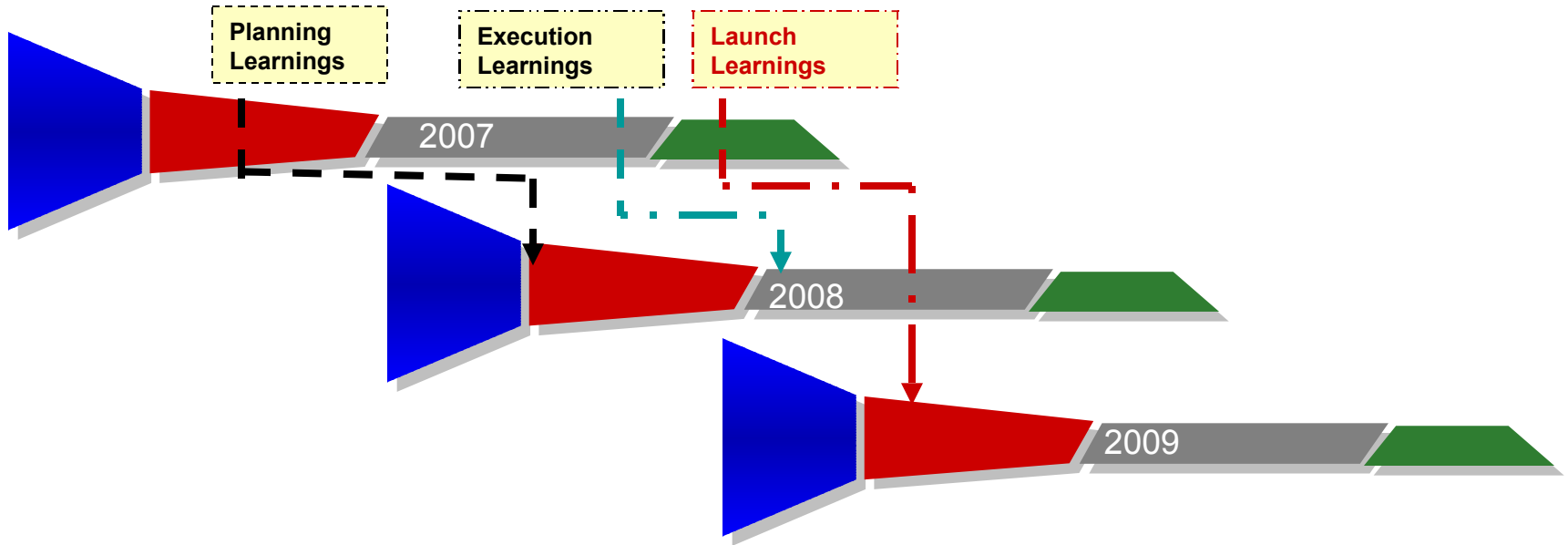
- Update existing systems
  - Multiple retrospectives across the established lifecycle
  - Entry and Exit criteria
  - Change happens via collaborative discussions
    - “this is how we work to constantly improve”
  
- Replace old behaviors
  - Team collectively decides
    - Self managed and self policing
  - Three, Six, Twelve month follow-ups
    - Email reminders (not as effective to ensure change)
    - 30 min 1:1
  - “Receiver” impact captured

# Why does institutionalized change need to be managed?



Source: Crossing the Chasm – author Geoffrey Moore

# Case Study: "Team Dolphin" Planning Team 2008 recommendations to 2009



# Team “Dolphin” Recommendations

- The sponsor requested a retrospective prior to the hand-off to the execution team to:
  - Improve platform planning efficiency through repeatability
  - Align with platform planning team(s) during the key scope, feasibility and commit milestones
  - Ensure all planning documents are achieving a specific work state to drive effective technical analysis
- **Top 3 Key Messages - Recommendations:**
  - Ensure a documented plan is achievable.
  - Add a new position and staff it within the planning effort to focus on identifying opportunities, gaps, and constraints.
  - Improve the use of tools to document and manage requirements.
- **Question: Who is the\*Receiver\*?**  
Who is **committed** to understand & apply all recommendations?

# What is a Change Agent?

A Change Agent is someone who influences or facilitates change within a group

A change agent serves as a *catalyst for change* and a *lightning rod for innovation* by

- Illustrating gaps and areas for improvement
- Shaping the environment to improve change effectiveness and receptivity
- Providing subject matter expertise
- Guiding the group through the details and challenges of the change process
- Confronting facts and speaking the truth

# Change Agent Behaviors

## A change agent

- **Uses experience and judgment** to apply the practices of change agency
- **Communicates with groups and individuals**, going person to person if necessary to foster change
- **Keeps the interests of the customer foremost** at all times
- **Remains unbiased and flexible**
- **Listens and observes** continuously
- **Helps people manage the anxiety** associated with change

**Key point:** Change Agents are not “turn-around artists” – effective change is a lifestyle rather than an event

# Behaviors to Avoid

Change Agents must avoid behaviors such as

- **Rigid adherence** to a single model or approach
- Placing **personal interests** ahead of the group's interests
- **Bias** towards any group or individual
- **Inflexible implementation** strategies
- **Prioritizing change ahead of business** reality and results
- **Personal attacks** – whether actual or perceived
- **Violation of personal trust** granted them by team members
- Participation in **conformance-related activities**

# Keys to Managing Change

- Determine if your company is a “Learning Organization”
  - What is your process to gather lessons learned?
  - How often do you require teams to stop and reflect?
  - Do you document the lessons learned in a consistent format and in one location?
  - Can you effectively search, monitor, and update the learnings?

# Keys to Managing Change

- Tailor the methodology
  - Ensure flexibility and scalability is part of the process
  - Ask questions to help determine how much change
    - Mobility story
    - What is your current process to capture learnings?
    - Are you open to trying a new approach?
    - Who typically sponsors these types of discussions?

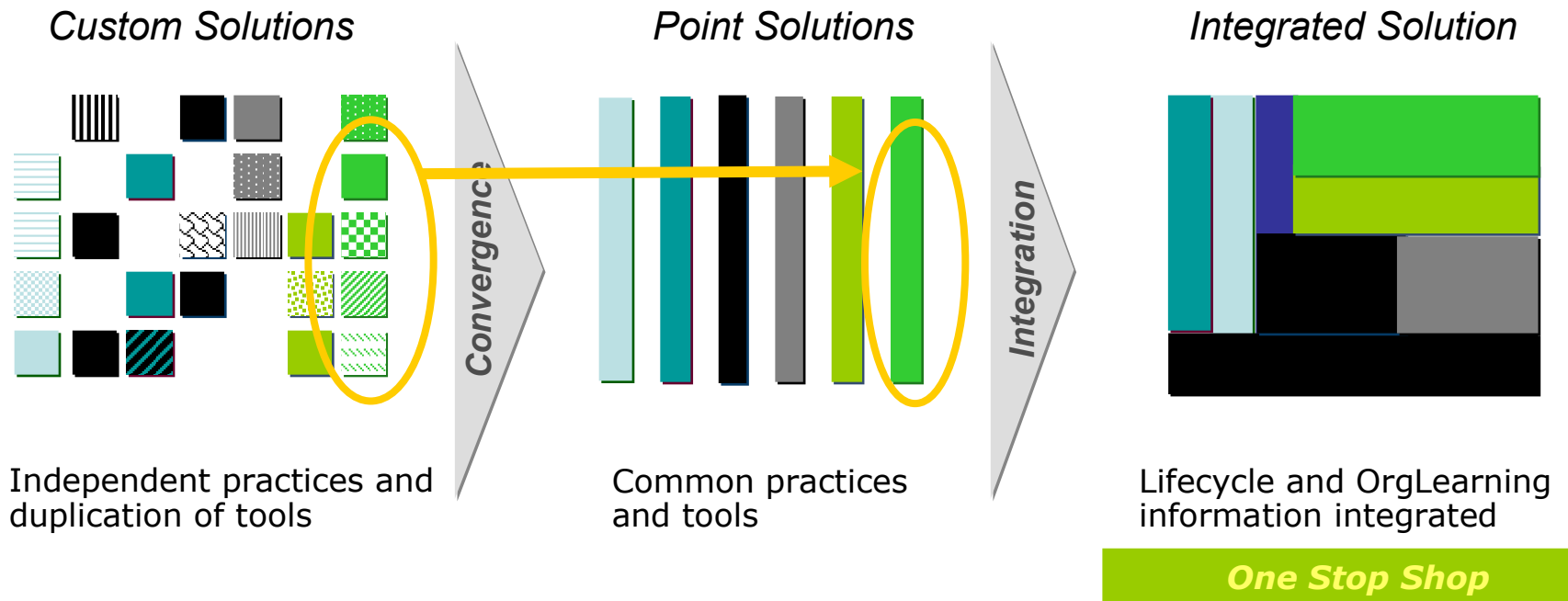
# Keys to Managing Change

- Ensure someone is accountable for results
  - Suggestions to help prevent apathy from taking over
    - Risk management story
    - What is the number one item this team believes MUST be done differently next time?
    - Who has the passion to document & post the action plan?
      - What was the problem? Lack of Y, resulted in X.
      - What is a suggested solution?
      - Who would be the right owner to move the action forward?
    - Who is the “receiver” committed to “doing” something with the recommendations?

# Keys to Managing Change

- Make changes to existing work systems
  - Product Lifecycle (PLC) or Software Development Life Cycle (SDLC)
    - Entry/Exit criteria
    - Document Learnings “biggies”
    - Query before entering a phase or milestone
    - Commit to apply a learning
- Review reward systems
  - Desirable, timely, and provides reinforcement of the change
  - Tailor the reward to match the effort

# Long-term Strategy



**Objective:** Change Agents to improve lifecycle execution using enterprise practices and tools across interdependent projects

# Conclusion

- How do you get started?
  - What is the value proposition for broad deployment?
  - What is our strategy to “cross the chasm”?
  - What is the organizations current learning capability?
  - Who are the “change agents” implementing change?
  - What changes need to be considered to existing work systems?
  - What reward systems do we need to reinforce positive behavior?

# Wrap up

- What did you like about this presentation today?
- What needs to be done differently next time?

# Contact information

- Please feel free to email questions!
  - [Debra.S.Lavell@intel.com](mailto:Debra.S.Lavell@intel.com)

# Back up Materials



# Leadership vs. Management

A change agent may be called upon to **lead** change or to **manage** it; these are very different activities

## Leadership

- Setting direction and vision
- Communicating and aligning
- Motivating and inspiring

## Management

- Planning and budgeting
- Organizing and staffing
- Problem solving

Source: *A Force for Change: How Leadership Differs from Management*