Process Facilitation

We recognize that sometimes it is helpful to have someone who can act as a Process Facilitator. This is a person (or possibly even a group) who can help us follow the rules and practices of Agile-Lean and develop our capacity to apply the principles of Agile-Lean.

Core Responsibilities

Evaluates the health of the process
Builds the capacity to use of the process
Removes obstacles
Facilitates process improvements

Core Activities

Facilitates meetings (Progress, Engagement)
Track progress of the team (growth and advancement)
Supports the Growth Facilitator(s)
Supports the Team Members
Coaches Stakeholders on the process
Maintains the Obstacles List

Hourly Checklist
  – Listen to and participate in team conversations
  – Take note of potential obstacles
  – Ask questions to team members about potential obstacles
  – Maintain the Obstacles list

Daily Checklist
  – Record progress on Cycle Chart (burndown and completed)
  – Facilitate the Progress Meeting
    – Ask all team members to stand (this helps the meeting stay short)
    – Encourage team members to stay on topic
    – Keep it to 30 minutes or less
  – Participate in Progress Meeting, including progress on obstacles
  – Remove obstacles and note progress
  – Communicate large obstacles to the Agile-Lean Transformation Team

REMEMBER: TRUTHFULNESS, CONSULTATIVE DECISION-MAKING, THE LEARNING CIRCLE

Cycle Checklist
- Record progress on Project Chart (burndown and value)
- Prepare for the Engagement Meeting
    - Reflection method/exercise to use
    - Learning method/exercise to use
    - Invite people throughout organization to the Demo
    - Create a list of topics to be discussed
    - Identify one or more team member(s) to welcome stakeholders
    - Identify one or more to team member(s) to perform/setup demonstration
- Facilitates the Engagement Meeting
    - Time-box the Engagement Meeting
    - Prepare the room for the demo
    - Participate in the demo
    - Ask for feedback from the stakeholders after the demo
    - Debrief the team after the demo
    - Focus the team on reflections (what did we actually do?)
    - Focus discussion on real/actual learning
    - Prioritize list of learnings
    - Ask the Growth Facilitator(s) to move into planning
    - Participate in the planning of the cycle
    - Ask the team to commit to the cycle plan
    - Try to keep the entire meeting to 4-6 hours
- Provide the list of learnings to the team
- Update the Agile Rules Adoption Worksheet with one other team member
- Read books on agile, lean, and other useful topics
- Research agile and lean on the web (blogs, articles)
- Help to expand the Definition of Done for a Cycle and for a Value Driver

Other things to keep in mind
- Overcoming Obstacles
    - Follow this process in sequence for maximum results
        1. In-person visit
        2. Phone conversation
        3. Email
- Ways to improve the team room (physical environment)
    - Eg. "8 Team Room Tips" from AgileAdvice.com
- Ways to improve cohesion of the team (quality of personal interactions)
    - Eg. Encourage the use of Consultative Decision Making
- Build capacity of team to learn the function of a Process Facilitator