

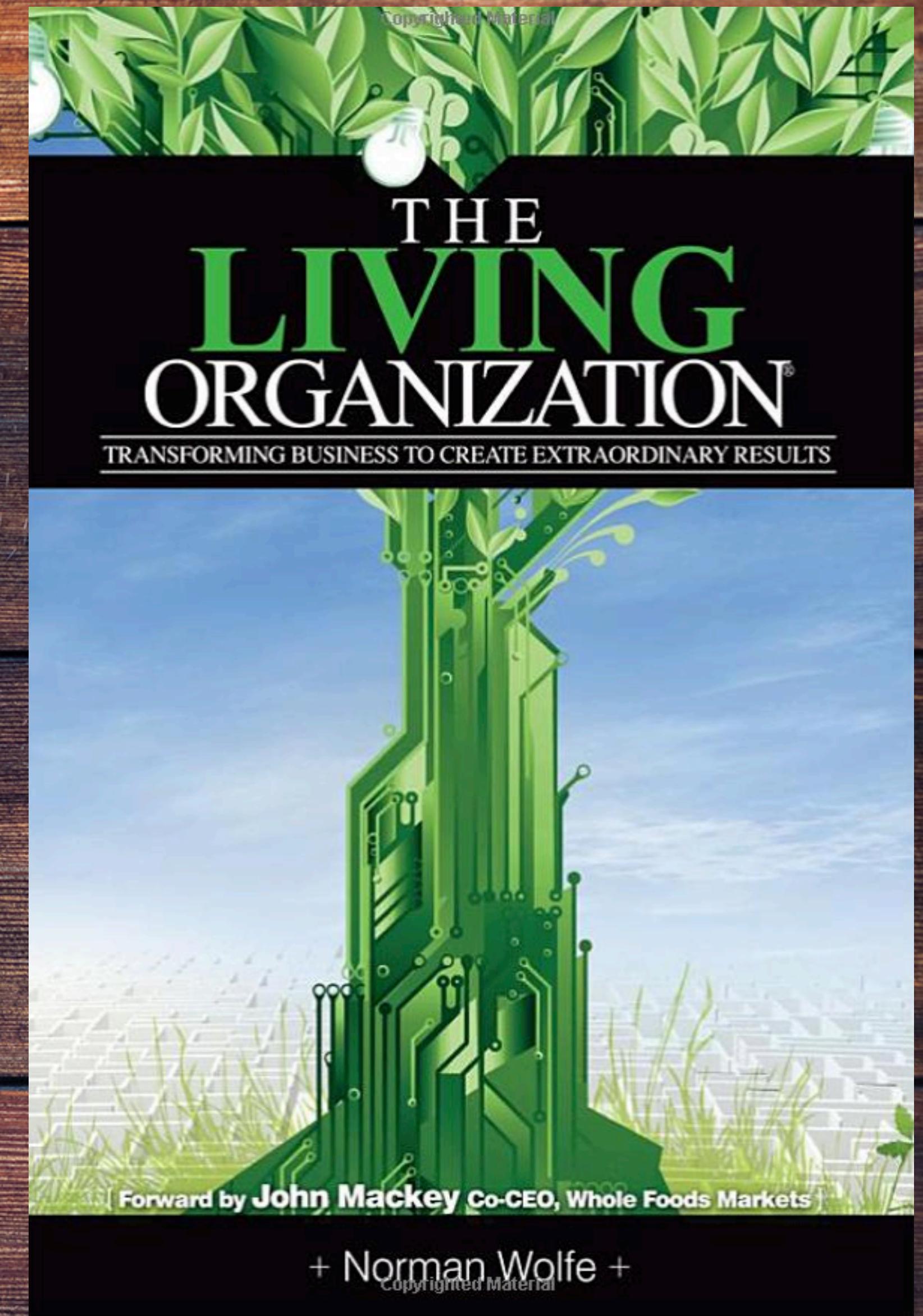
UNLOCK AGILE ACROSS THE ORGANIZATION WITH TACTICAL MEETINGS

(an aspirational call to action)

JONATHAN YANKOVICH
QUANTUM LEADERS

QUANTUM LEADERS

THE LIVING ORGANIZATION
NORMAN WOLFE

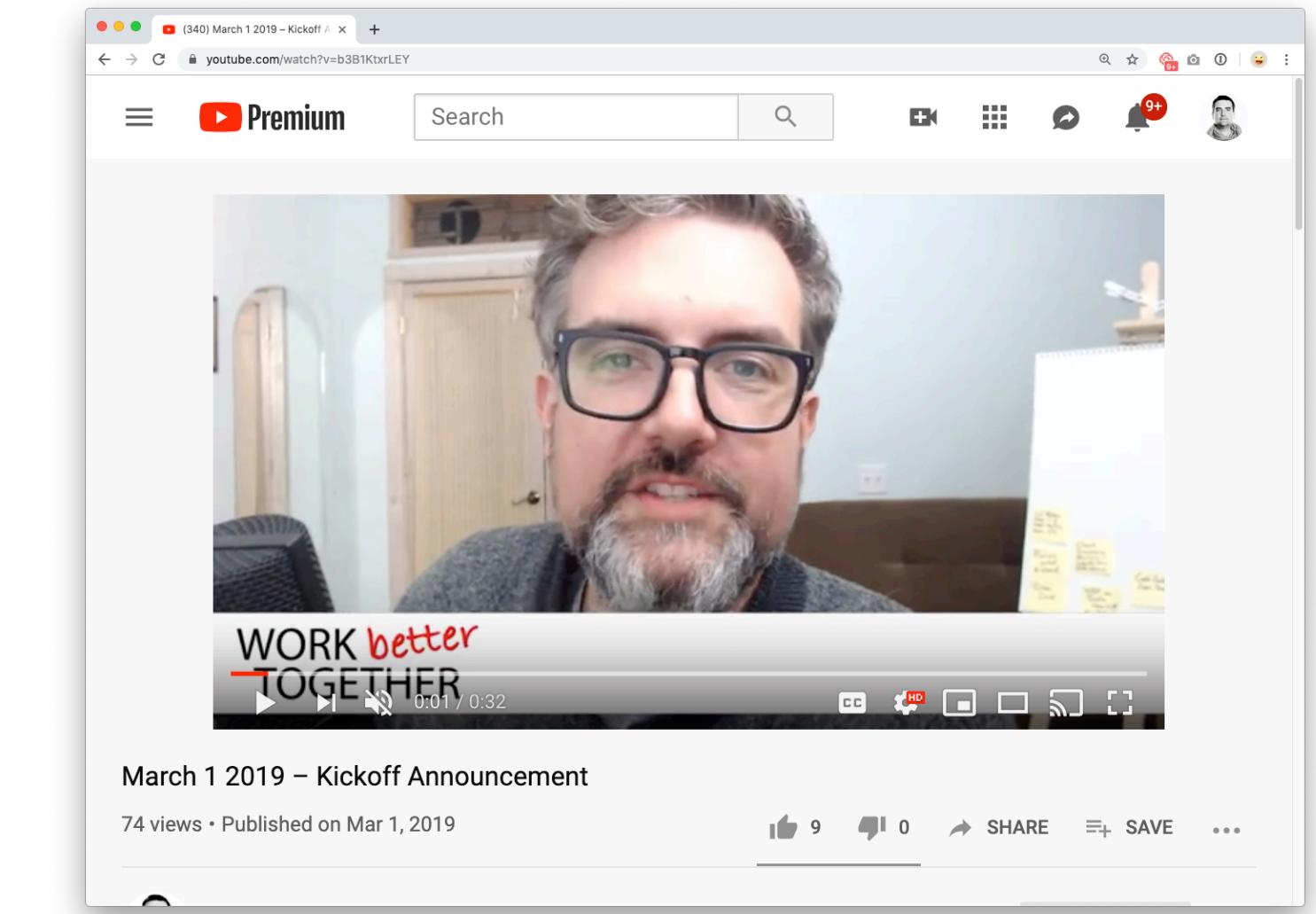
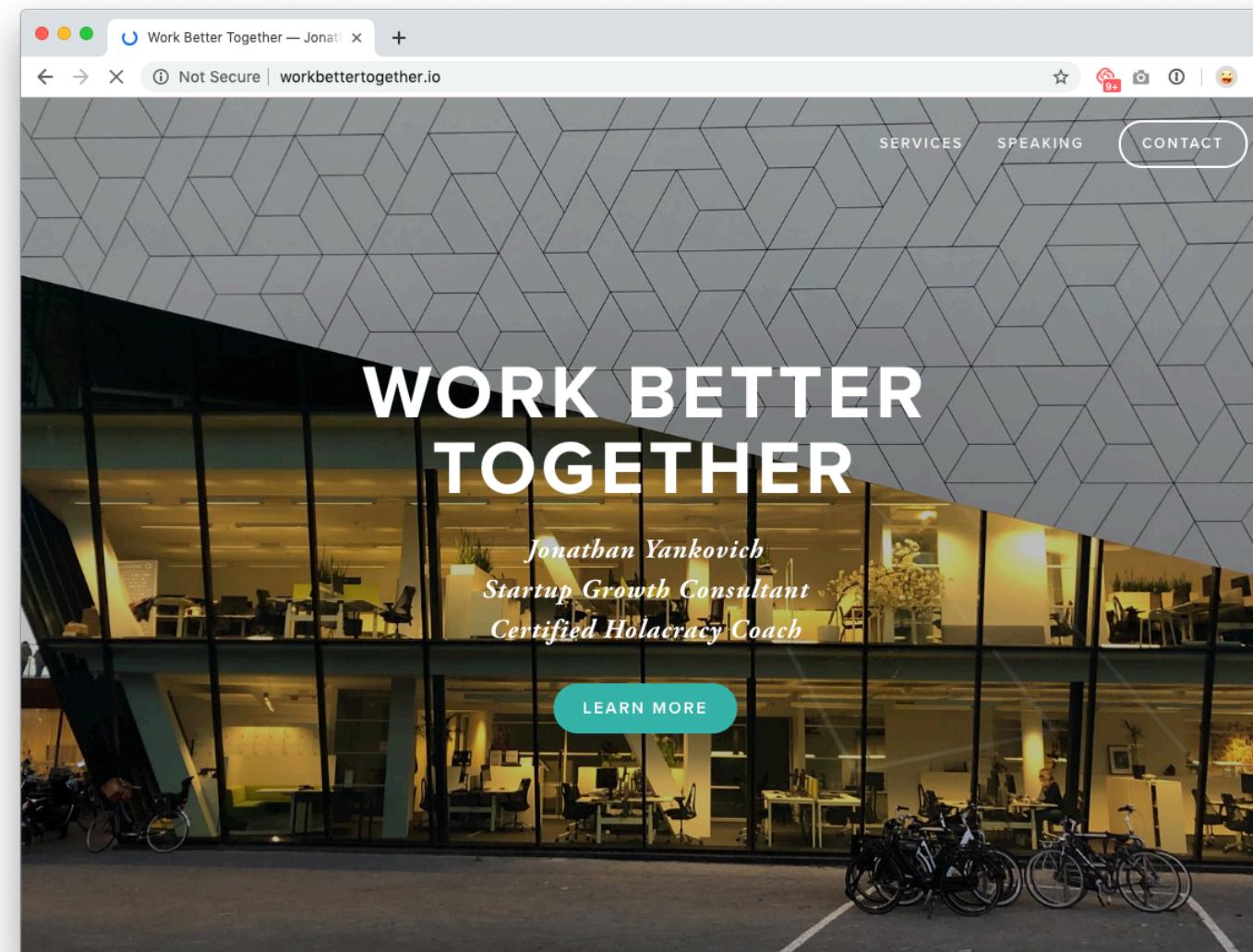


UNLOCK AGILE ACROSS THE ORGANIZATION

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- self-management advisor & consultant
- 5+ years partner at leading self mgmt firm
- agile native
- recovering developer

JONATHAN YANKOVICH



Consulting

quantumleaders.com

Products

teal.dog

Education

YouTube, Workshops
teal.dog/youtube

* 20% time

THE MAP IS NOT THE TERRITORY



UNLOCK AGILE ACROSS THE ORGANIZATION

Questions & feedback

to: j@teal.dog

subject: Agile Camp Talk



UNLOCK AGILE ACROSS THE ORGANIZATION

Agenda

- i. the case for tactical meetings
- ii. tactical meeting format
- iii. maybe demo

THE CASE FOR TACTICAL MEETINGS

What is a Tactical Meeting?

A Tactical Meeting is a specific meeting format with 5 steps, supported by a facilitator with the goal of surfacing information, identifying impediments and moving work forward.

THE CASE FOR TACTICAL MEETINGS

Complexity

- Software is complex
- The world is complex

THE CASE FOR TACTICAL MEETINGS

Why Agile?

- response to a problem
- requisite way of working
- enables learning

THE CASE FOR TACTICAL MEETINGS

startup envy

THE CASE FOR TACTICAL MEETINGS

so, how?

THE CASE FOR TACTICAL MEETINGS

Solution

- Better leaders?
- Better structures & processes!

THE CASE FOR TACTICAL MEETINGS

A Parallel

“scientific management”
defined a “best way” based on modeling
resisted by workers

“agile”
defined a “best way” based on modeling
resisted by managers

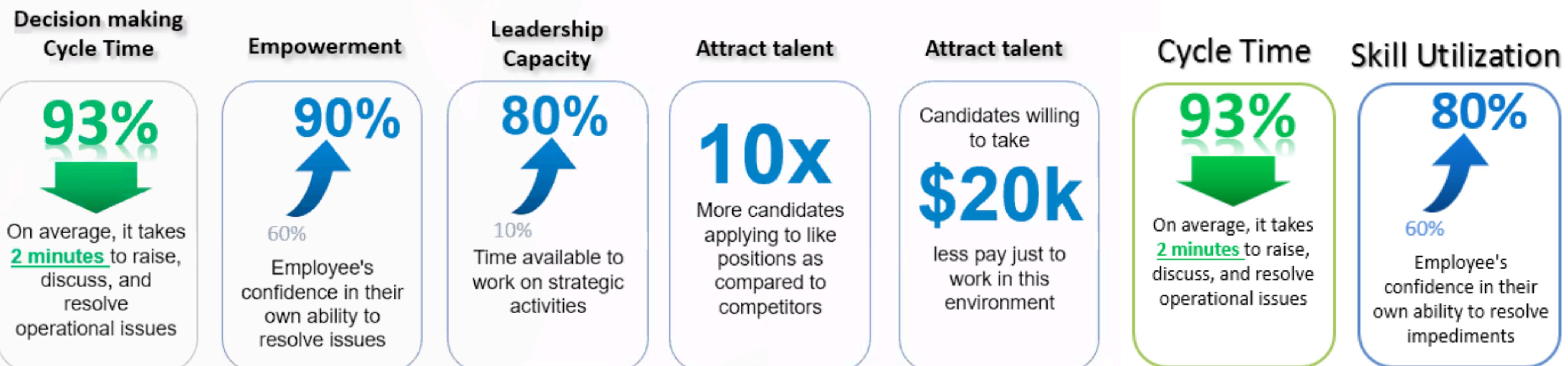
But “management” is still artisanal



Frederick Winslow Taylor, 1856-1915

THE CASE FOR TACTICAL MEETINGS

Case Study: Washington Dept. of Technology (WATECH)



<https://ocio.wa.gov/news/heck-kaizen-kaikaku-your-hierarchy>

THE CASE FOR TACTICAL MEETINGS

You know your developers are expensive.

Do you know how expensive your meetings are?

THE CASE FOR TACTICAL MEETINGS

paradox of leadership

TACTICAL MEETING FORMAT

Why do we have meetings?

TACTICAL MEETING FORMAT

Why do we have meetings?

- Get alignment
- Share status
- Identify risk
- Make decisions
- Solve problems
- Get clarity

TACTICAL MEETING FORMAT

Why we have tactical meetings

- Surface Information
- Move work forward

TACTICAL MEETING FORMAT



TACTICAL MEETING FORMAT

requirements

TACTICAL MEETING FORMAT

requirements

- regular frequency (weekly)
- trained facilitator (not team lead)
- living list of projects & metrics
- living list of responsibilities

TACTICAL MEETING FORMAT

format

TACTICAL MEETING FORMAT

format

- check-in round
- metrics review
- projects review
- agenda ←
- closing round

TACTICAL MEETING FORMAT

check-in round

- get present
- call out distractions

one person at a time, no discussion

TACTICAL MEETING FORMAT

check-in round

- get present
- call out distractions

one person at a time, no discussion

TACTICAL MEETING FORMAT

metrics review

- surface information about the world
- review checklist items & metrics
- a person and role is accountable for each

“check or no check, or a number”, no discussion

* save discussion for agenda

TACTICAL MEETING FORMAT

project review

- “walk the board”
- share only changes since last meeting

facilitator, cut people off if they go into detail

clarifying questions allowed, no discussion

* save discussion for agenda

TACTICAL MEETING FORMAT

agenda (triage issues)

- **dynamic, on-the-fly, anyone may add**
- **resolve items using the four pathways**
- **items processed one at a time**
- **add new items as they come up**
- **everyone's goal is to help the item holder**

TACTICAL MEETING FORMAT

dynamic, on-the-fly agendas

- facilitator picks the next item
- add new items between each
- use whiteboard, chat, shared doc, or app
- items processed one at a time

TACTICAL MEETING FORMAT

processing agenda items

- each item starts,

“What do you need?”

- and ends with,

“Did you get what you need?”

TACTICAL MEETING FORMAT

processing agenda items

- facilitator's job is to hold to the process
- focus on the current item

Don't let anyone hijack the agenda!

Direct hijackers to add their own item!

(Even if the topic is the same!)

TACTICAL MEETING FORMAT

the four pathways



TACTICAL MEETING FORMAT

closing round

- share a closing reflection
 - one person at a time, no discussion
 - how did it go? what could be improved?
 - say anything you need to feel “complete”
- * this is the retro

TACTICAL MEETING FORMAT

maybe demo

TACTICAL MEETING FORMAT

facilitator stance

TACTICAL MEETING FORMAT

facilitator stance

- like a referee, or a traffic cop
- don't "help" • let people learn

*"the facilitator protects the process,
and the process protects the people"*



TACTICAL MEETING FORMAT

side effects

TACTICAL MEETING FORMAT

side effects

- more accountability = more responsibility
- more individual authority & autonomy

*"anything you do in a tactical meeting
can be done outside of a tactical meeting"*

CONCLUSION

This is the most powerful, versatile meeting format I've never seen. If I could only teach one thing to people, it would be the tactical meeting.

TAKEAWAYS

What do you need?

Did you get what you need?

One concern at a time.

Use the four pathways.

Process early, process often.

QUESTIONS & FEEDBACK

j@teal.dog

FURTHER LEARNING

teal.dog/youtube

teal.dog/meet

books:

Reinventing Organizations

Team of Teams

Holacracy

The Living Organization

