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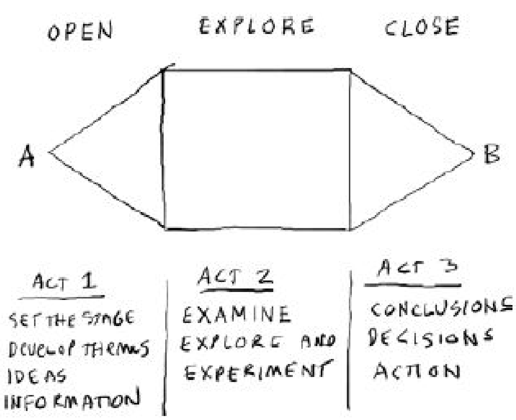
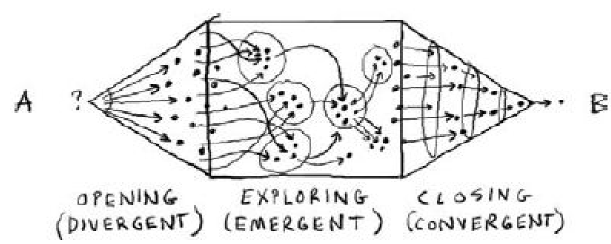
Generic retrospective agenda

Stage	Description	Tools
Setting the stage	Get everyone on the same page and make sure they context is favorable for the retrospective	2 truths and a lie, super heroes, in one word, ESTP, DPA, Safety check, Working agreements
Gather data	Start with what we know right now. Observations only, no judgement	Fishbone, Timeline, Métrics, Speedboat, skill matrix, etc
Generate insights	Putting the collective intelligence at work	5 whys, 6 thinking hats,
Decide what to do	Select and decide on the next steps making sure they are actionable	Dot voting, SMART, Responsibility matrix, tiny habits
Close	Close the retrospective in a positive way	Appreciation shower,

Tip: You can get more ideas for exercises at: http://plans-for-retrospectives.com or http://www.funretrospectives.com

The creative process





The creative process is not linear. In order to make the most of it, the following diamond shaper pattern is proposed.

1. Set the stage, develop themes, ideas and information.
2. Examine, explore and experiment with the ideas.
3. Conclude, decide, select and take action.

The prime directive

One of the most obvious fears people have when first trying a retrospective is that the ritual will become a negative gripe session, interspersed with blame and counter blame.

Clearly such an event will not contribute to much learning.

The key to a constructive successful ritual is assuring that all the participants adhere to the **Retrospective Prime Directive**.

> *Regardless of what we discover, we understand and truly believe that everyone did the best job they could, given what they knew at the time, their skills and abilities, the resources available, and the situation at hand.*

At the end of a project everyone knows so much more. Naturally we will discover decisions and actions we wish we could do over. This is wisdom to be celebrated, not judgement used to embarrass.

Designing a Partnership Alliance (DPA)

This step creates a foundational platform on which we will base the rest of our work. When designing the partnership alliance, the facilitator helps the members of the team to start building alignment about the way they want to work together. It is also one of the first steps to consciously start shaping the team culture and become co-responsible of its conservation.

The Design of a Partnership Alliance needs to address these two topics:

- **Creating a safe space for the relationship:**
  This is the space the members of the alliance want to create. The advantage of creating this space is that even if circumstances change, the team is always able to come back to their optimal way of working using the Partnership Alliance as an anchor point.

- **Sharing responsibility:**
  Clarifying what we can count on each other for.
  What is the role of each person in the experience we are creating.
  This shared responsibility empowers the members of the team and develops leadership.

Useful questions to design a Partnership Alliance:
- What kind of atmosphere / culture do you want to create in the team? How will you know that you achieved it?
- How do you want to feel? What values do you want to hold and promote in your team? How will you know that you achieved it?
- How do you want to behave when things get complicated? When there is conflict?
- What are your protocols in case of conflict?
- What can help the team growth?
- What can the team count on you for?
- What can you commit to? How will you know if you do?

The Designed Partnership Alliance is not only a tool to kick-off a collaboration. It is also useful in any future interactions of the team as a reminder of the type of collaboration we want to have.

It is a living document that can evolve to adapt to new contexts and circumstances.

Lastly, after it has been designed, it is essential to always keep the Partnership Alliance visible so everyone can see it and make sure it is followed.

This Partnership Alliance is only useful if it is respected, and the team accepts the challenge to live by the standards they have established.

Ingredients of Trust

These are some essential ingredients of trust...

Competence: Do we think people can do the jobs they need to do? And do we know they won't let us down?
For instance, when we take planes, we trust pilots to take us to our destination. We trust them because we believe they are competent at their jobs.

Openness: Are people sharing information fully and for the best outcome for the team?
If people don't share information with us we can become suspicious – remember information is power. Sometimes information can't be shared but it is important for colleagues to understand why that is the case. On the other hand, when people share information with us it sends a positive signal that they do trust us, and we are more likely to in turn trust them.

Integrity: Do people do what they say they will do?
If people keep their promises, we are more likely to trust them. On the other hand it is sometimes tempting to promise things, not to say no, in order to please people. But trust can break down really quickly if we say one thing and do another.

Reciprocity: Can you see that your colleagues trust you, and are you then more inclined to trust them back?
Someone's trusting you makes it easier for you to trust them. But if we feel someone is not trusting us, this can lead to the opposite where mistrust can create a damaging and negative environment.

Compatibility: Do you share values, history, interests and objectives with your colleagues?
Most of us will feel more comfortable and likely to trust those we feel are "like us". If understanding someone who likes and knows what you like can be easy, building trust with someone with different expectations, aspirations and experiences is more challenging, but just as important.

Goodwill: Do you care about your colleagues and do your colleagues care about you?
The work a team does can be demanding and stressful and everyone needs their colleagues to help them out from time to time.

If my colleagues value my contribution to the team, notice how I feel and take the time to get to know what matters to me outside of work, I will find it easier to trust them. If I also look out for them, they are more likely to do the same with me. This will be even more important to build trust in cultures where personal relationships are extremely important.

Predictability: Are your colleagues consistent in their behaviours in different contexts and over time?
For example when I lend money to a good friend, I am able to assess the risk as I have known their behaviour over time, so I know how likely it is they will repay me.

Well-being: Do I feel I have nothing to fear from my team members?
Can I make genuine mistakes without being judged when something goes wrong it is easiest to point the finger and blame someone for it, but it is difficult to trust people if we are afraid of them. We can become defensive, there is less communication, less initiative and less innovation in the team. A sign of this could be when people start asking for everything in Writing.

Inclusion: Is anyone left out or excluded from the team?
Do people feel actively included in the teams' social and work activities? Some people are more social than others and some like to be alone more. In teams divisions can also form around culture or nationality, as some people may for example need time with others who share their mother tongue. All of this is natural, but we all need to be included in important team activities so that these differences don't damage team spirit.

Accessibility Do we feel others can be approached easily and are open about their feelings?
If so, it will usually lead others to trust them more easily. Some people share their emotions while others may keep their thoughts and feeling to themselves, which can make them appear distant and uncommunicative. Accessibility may be more valuable in some cultures than others.

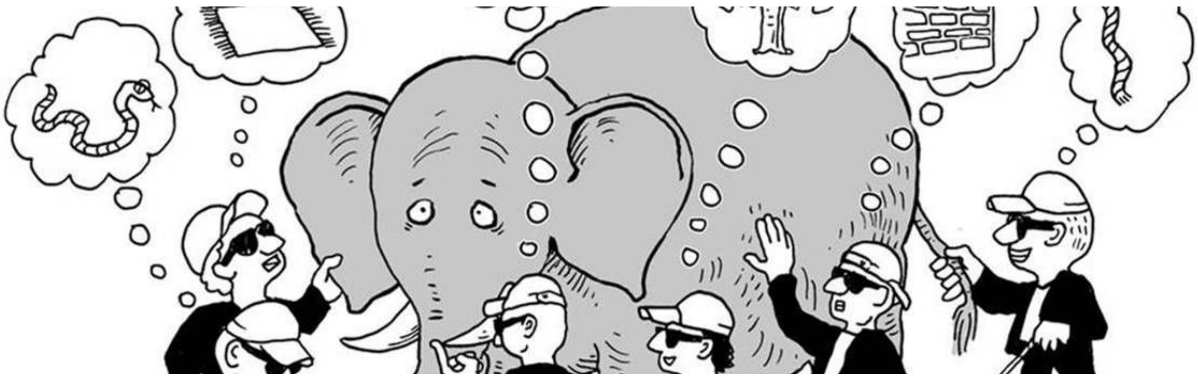
These criteria can be subdivided into **two significant categories**: swift trust and deeper trust:

- **Quick trust or swift trust** can be more readily achieved and are necessary during the early stages of a team's existence.
  The relevant criteria for trust are: **competence, openness, integrity, reciprocity.**

- **The deeper level of trust** takes more time to establish and requires continual effort in every aspect of the team's work.
  The relevant criteria of trust are: **compatibility, goodwill, predictability, well-being, inclusion, accessibility.**

6 thinking hats

Edward DeBono's 6 thinking hats is a facilitation technique that helps a group or team navigate the creative process effectively. It takes into consideration the perils that arise in the creative process when the ideas are being analyzed from different perspectives.



In the 6 thinking hats, each hat represent different perspectives. When wearing a hat, the group looks at the idea from the same perspective and avoids the conflicts of communicating from different perspectives at the same time. A facilitator using the blue hat guides the group through each of the other hats.

These are the hats and their perspectives.

Six Thinking Hats • Edward De Bono • edwdebono.com/
Drawn by graphic facilitator Brandy Agerbeck • Loosetooth.com

General guidelines for facilitation:

- Someone always wears the blue hat and guides the session.
- Start with the white hat (facts, figures and other information)
- After the green hat **never** the black hat.
- After the green hat **preferably** the yellow hat.

Identifying interests behind suggestions

Three steps

1. **Listen**
    - Don't interrupt
    - Define a specific time to listen
    - Let the other person express him/herself fully

2. **Reflect back**
    - What I understand you are saying is...
    - Did I understand you correctly?

3. **Clarify**
    - Why is it important for you?
    - Why do you think it is important for the team?
    - What value does it bring to the business?

Interests (Why is this person suggesting this?)

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____
____
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Defining S.M.A.R.T Goals

S.M.A.R.T. stands for: Specific, Measurable, Action-Oriented, Realistic and Timely. A great way to make sure the actions that come out of your retrospective get done.

SPECIFIC: A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

- Who: Who is involved?
- What: What do I want to accomplish?
- Where: Identify a location.
- When: Establish a time frame.
- Which: Which constraints and requirements need to be fulfilled. Identify them.
- Why: Specific reasons, purpose or benefits of accomplishing the goal.

EXAMPLE: A general goal would be, "Get in shape." But a specific goal would say, "Join a health club and workout 3 days a week."

MEASURABLE: Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal.

Tip: To determine if your goal is measurable, ask questions such as……

- How much? How many?
- How will I know when it is accomplished?

ACTION ORIENTED: For us to be able to act towards achieving our goal, we need to be able to break it down and create an action plan of smaller tasks we can easily complete.
This will give us more clarity at the moment of working on the goal, will allow us not to get overwhelmed by the bigger objective and help us build momentum and motivation.

REALISTIC: To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress.
Your goal is probably realistic if you truly *believe* that it can be accomplished.

Tip: Additional ways to know if your goal is realistic is to:

- Determine if you have accomplished anything similar in the past
- Ask yourself what conditions would have to exist to accomplish this goal.

TIME-BOUNDED: A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency
.

EXAMPLE: If you want to lose 10 lbs, when do you want to lose it by? “Someday” won’t work. But if you anchor it within a timeframe, “by May 1st”, then you’ve set your unconscious mind into motion to begin working on the goal.

The 5 whys

This analytical tool is intended to get to the root cause of a problem by asking ‘why’ or ‘what caused this’ several times. Each question seeks a deeper understanding until the asker discovers the root issue. It was first popularised by the Toyota Production System to try and separate symptoms from causes in order to ensure any corrective action is treating the right problem. Taiichi Ohno said, ‘by repeating why five times, the nature of the problem as well as its solution becomes clear.’

Key benefits of 5 whys:

This simple tool does not require any complex analysis; everyone can understand the idea and therefore it can be used throughout an organisation at any level to assist in immediately investigating a problem.

Because anyone can use it, and the tool encourages people to track issues to their source, it encourages teamwork and cross-functional thinking.

It is cheap and can be used in conjunction with many other problem-solving techniques.

Implementation

Prerequisite
Assemble a team of people who have a breadth of knowledge about the area, or seek out extra knowledge in order to trace the relationships between various problems.

Asking the 5 whys
Describe the problem as well as you can – use a whiteboard to write up a description the team agrees with.

1. Ask the team why the problem occurs. Draw a line from problem to the suggested cause A.
2. Ask the team why cause **A** occurs. Draw a line from cause **A** to new cause **B.**
3. Continue until it feels impossible to discover a further root. In practice you may need to ask ‘why’ more than 5 times, or fewer. It is also possible that a problem might have more than one root cause.
4. Ensure the team agrees that resolving the root cause would stop the problem at the top from occurring.

Potential pitfalls
- A single mistake in any of the causes linked to the problem will give misleading results, meaning that the team might implement a solution which fails to fix either the symptom or the cause.

- The team's knowledge might not be sufficiently broad to track causes outside of their knowledge area.
- People can stop asking why too early, isolating a single cause when there may be several that must be tackled to overcome the problem.

You can improve the technique by asking yourself some further questions as a check at each step:

- What have we observed or measured that leads us to connect this problem to this cause?
- Are there any other causes that could give rise to the same problem?
- Must anything else happen in order for this cause to create the problem? This is often a sign that you need to keep asking why.

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Planning my retrospective

Objective *(what is the goal of this retrospective)*:

____

Who is participating *(how do they affect the result or facilitation*:

____________________ ____________________ ____________________ ____________________
____________________ ____________________ ____________________ ____________________
____________________ ____________________ ____________________ ____________________

__:__	______________________________ ______________________________ ______________________________ ______________________________ ______________________________	**Setting the stage** Are there any introverts? Can people speak freely? Do they know each other? Do they have working agreements? Do you expect conflict?
__:__	______________________________ ______________________________ ______________________________ ______________________________ ______________________________	**Gather data** What kind of data do you need? What data do you have available to support the discussion? Is the emotional data included?
__:__	______________________________ ______________________________ ______________________________ ______________________________ ______________________________ ______________________________	**Generate insights** Are all voices being heard? Are all perspectives being considered? Are we brainstorming effectively (diamond shape process)?
__:__	______________________________ ______________________________ ______________________________ ______________________________ ______________________________ ______________________________	**Decide what to do:** Are actions SMART? Do we know who, when and what? How do we make them sustainable in the long term? What is the result we expect to see?
__:__	______________________________ ______________________________ ______________________________ ______________________________	**Closing:** How effective was the retrospective? What impression are people leaving with?

Materials and preparation:

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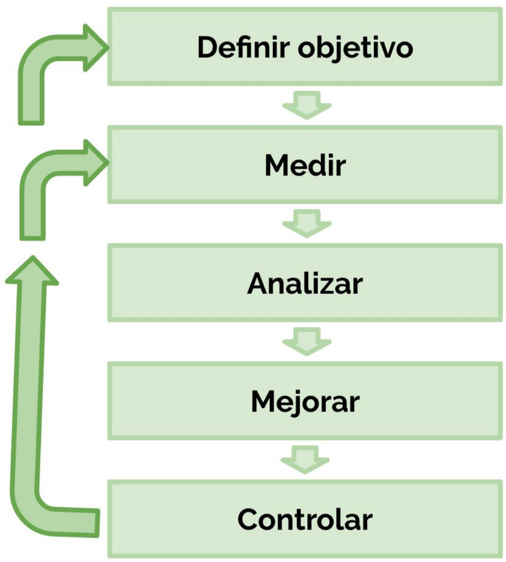
Kaizen improvement guided by metrics



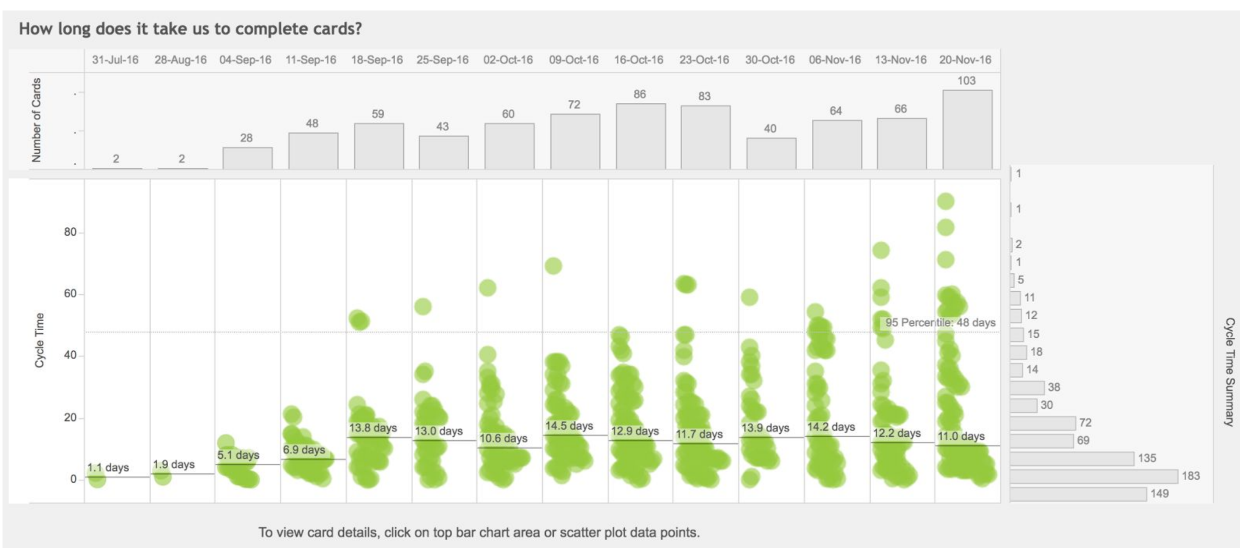
When to use this Kaizen process?

- We have detected obvious sources of waste
- The scope and constraints of the problem are well defined
- We need immediate results
- The implementation risks are minimal
- We need to create momentum and motivation

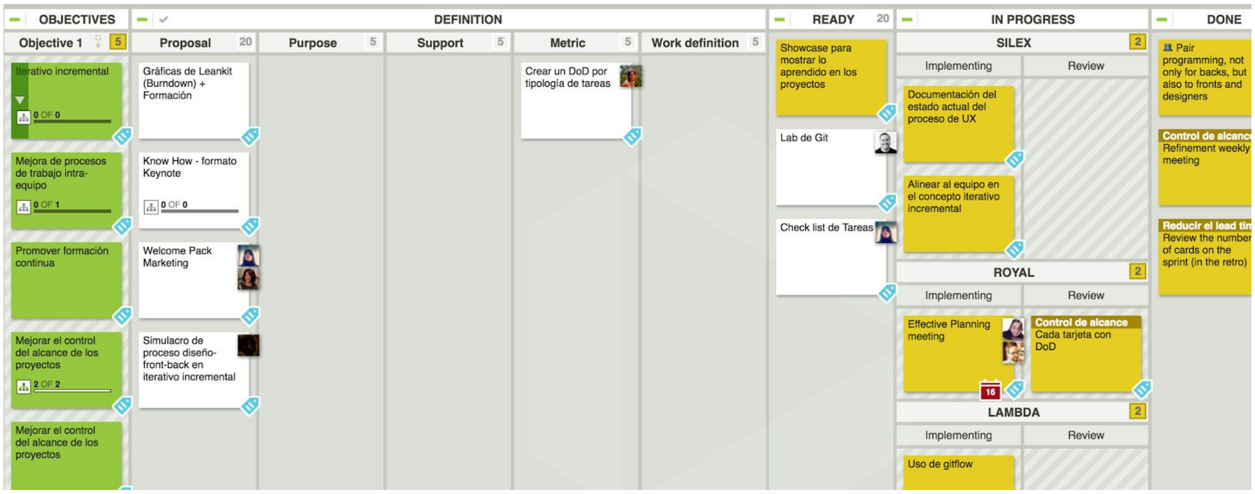
What each stage is trying to solve

- What do I want to improve?
- How will I know?
- What should I do?
- How do we put it in practice?
- How did it go?
- How we finished?

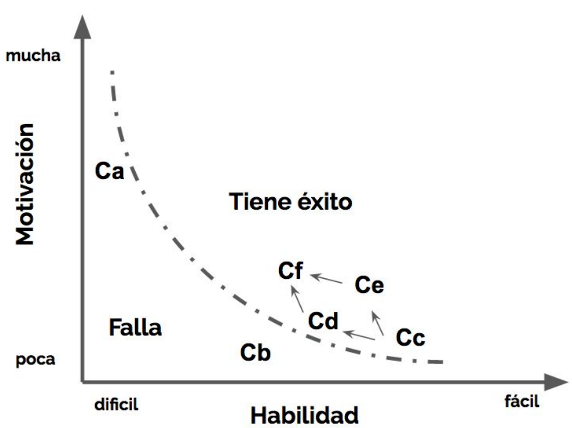
Control chart



Backlog and Improvements panel example



BJ Fogg's model



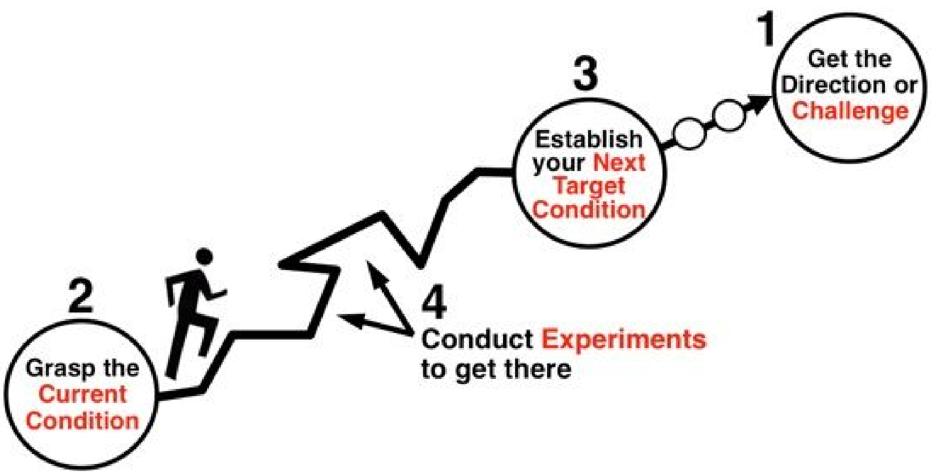
For the behaviour to occur all three variables must be met at the same time

Behaviour **=** **T**rigger **x** **M**otivation **x** **S**kill
Comportamiento = Detonante x Motivación x Habilidad

- Start small… super small… tiny..
- Build momentum
- Celebrate accomplishments

Toyota Kata

The improvement kata:
Is the part of the toyota kata where we apply the scientific method to discovering the solution that ultimately will take us where we want to go. It consists of four steps that repeat in cycles until we are satisfied with the result.



The coaching kata:
The coaching kata is a series of questions to be asked during each iteration or experiment. The objective is to get the brain thinking and learning about what happened and at the same time create a consistent culture.

1. What is the Target Condition?
2. What is the Actual Condition now?
    a. What did you plan as your Last Step?
    b. What did you Expect?
    c. What Actually Happened?
    d. What did you Learn?
3. What obstacles do you think are preventing you from reaching the target condition?
4. What is your next step (next experiment)? What do you expect?
5. How quickly can we go and see what we have learned from taking that step?

Note: You will often work on the same obstacle with several experiments.