Make a basic presentation template

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SOP ID: XXX/YYY/QZZ
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Purpose & Application: Facilitating Retrospectives

Retrospectives are an important component of our development process. They allow our teams to reflect on their successes and challenges following a recent project or product release, and encourage intentional and forward thinking for upcoming projects. As a growing company, it's important that we maintain consistency across teams when it comes to soliciting feedback and setting goals for future endeavors.

The Operations team has put together this guide to help walk through each step of **organizing, facilitating,** and **documenting** team retrospectives so that we can learn from each other's processes and action the feedback that comes from these sessions more consistently.

Scope:

Your retrospective should address each of the following **three questions:**

1. What went well?
2. What could have gone better?
3. What can we do to make future projects more successful?

Definitions:

- **Retrospective** - *A structured session that gives teams time to reflect on a completed project. It allows a team to determine both the successes and failures of a project, as well as identify areas for improvement.*

- **Scrum Master -** *A scrum master helps facilitate scrum to the larger team by ensuring the scrum framework is followed.*
    - **Scrum -** *An agile project management framework that helps teams structure and manage their work through a set of values, principles, and practices.*

Responsibilities:

Facilitating retrospectives is a key responsibility of **project managers** (by either title or function). The person leading the retrospective should have a good understanding of the project's objectives and can identify the key players involved. The leader could include a **Scrum Master** supporting their team, a **product manager** overseeing a new feature release, a **team manager** coordinating a larger project, or anyone with a strong sense of the project's scope.

Procedure:

We use the "Project Retrospective" template created by FigJam. Click here to access the template and create a copy within your own account, by clicking **Open in FigJam**.

Once you have the template open, we recommend the **adjustments**, listed in **Step 1**, to get the file customized for your upcoming retrospective.

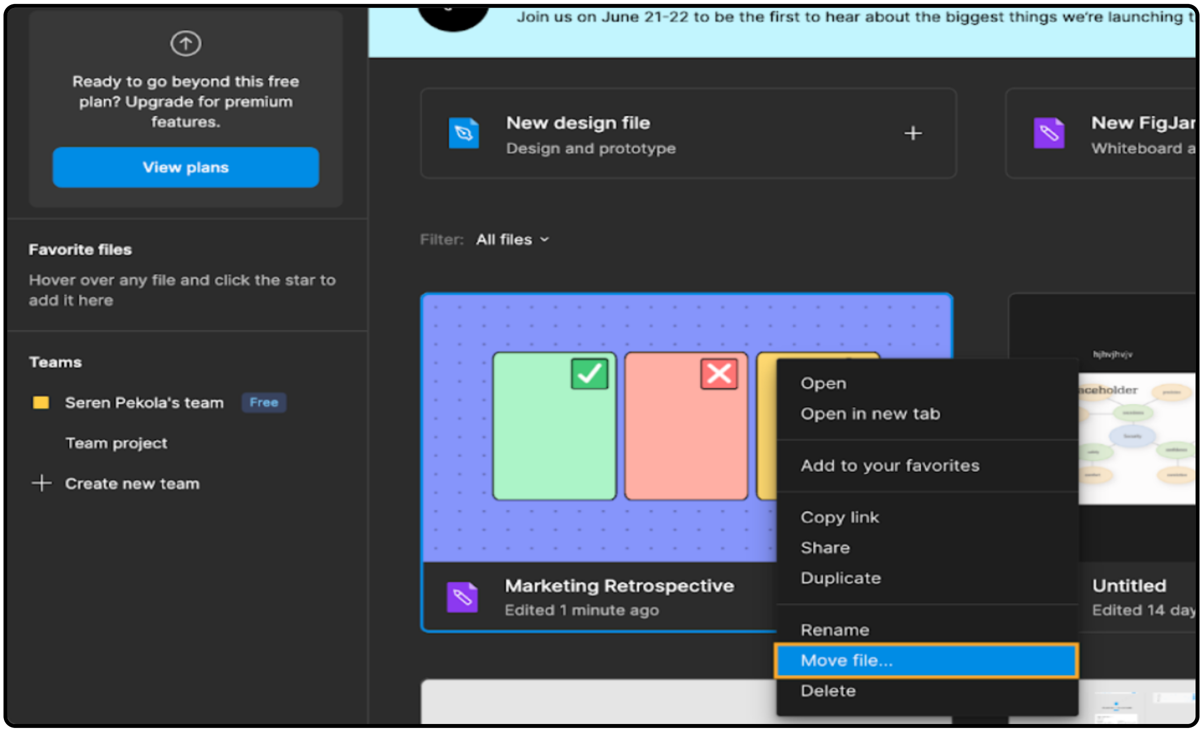
1. **Prepare the FigJam board**
   a. **Give it a name**
      i. Click on **Project Retrospective (Community)** at the top of the page and give it a new name.

Tip: We recommend giving it a name specific to the current project so that you can easily locate the file and differentiate it from other retrospectives in the future.

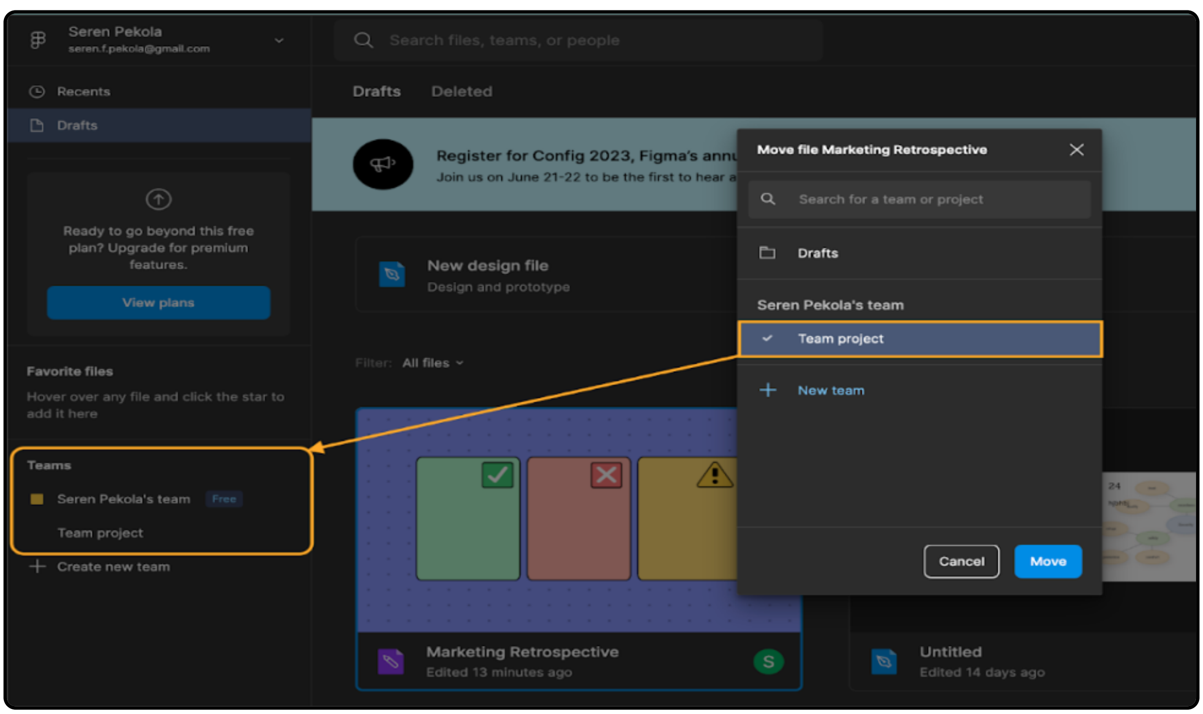
While you're at it, you can change the name in the file itself by double clicking directly on "Team Retro" to make it more customized to this particular session.

   b. **Move it to your projects**
      i. Before you can share the file with your team, it will need to live in a Project.

         - Click 'Drafts' at the top of the page.
         - Your Drafts page will open in a new tab.
         - Right click on your file, and click **Move File**.



- Search for or select your project name.
- Click **Move**.
- To locate the file, click into the Project name on the left sidebar.



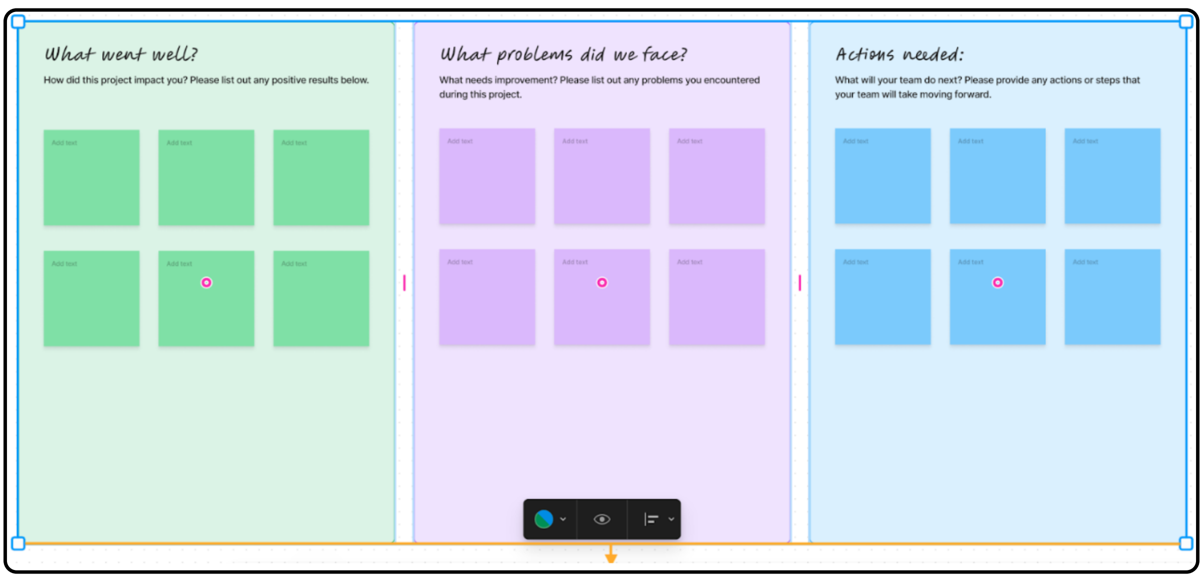
c. Modify the template

i. The template provides a consistent starting point for your session, but you may need to adjust the collaborative sections depending on how many contributors you anticipate for your meeting.

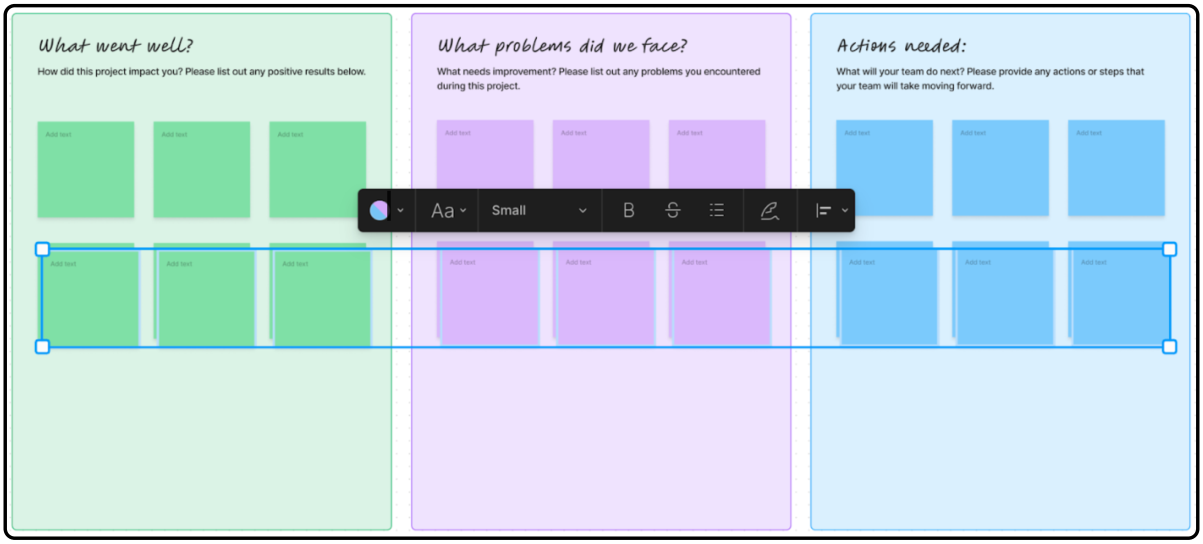
ii. First, double click into the sticky notes that have example responses. Delete the example responses prior to sharing the file.

iii. Each square comes with 6 sticky notes - this may not be enough for your group. You can increase the number of sticky notes beforehand to avoid needing to make that change once the meeting is in session:

- Click and drag your cursor to select the green, purple, and blue squares, so that all three have been selected as a group.
- Hover your cursor over the blue line at the bottom, click, and drag down to enlarge the squares.



- Highlight the bottom row of sticky notes for all three squares by clicking and dragging across the row.
- Duplicate the sticky note component, by using the keyboard shortcuts:
  - **Mac:** Command + D
  - **Windows:** Control + D



- Click and drag the stickies below the existing row.

- If needed, drag a corner to resize the green, purple, and green squares to contain the new rows.
- Repeat as needed.

Tip: If you just need to add one sticky note here or there, you can also easily add a sticky note component by clicking S. Then, click and drag the sticky note to the desired location.

If you need to add any additional context, notes, or resources to the file, use the text (T) button at the bottom to add a text area. You can use a shape component to create sections that stand out.

2. Send out the Invite

a. Share with email

i. Once you've customized the template for the size and scope of your meeting, click the **Share** button in the upper right-hand corner of the page to manage the file's share settings:

- Make sure that your permissions are set to: 'Anyone with this link can edit' - this ensures that your collaborators will be able to interact with the file during the meeting.

- Click the **Copy Link** button to grab the share link, then head to Outlook to schedule the meeting with your team.
- Create a meeting invitation and send it to all relevant parties.

Tip: Encourage those invited to loop in any other team members that you may not have been included in the original invite. While you may have a good sense of who played a part in the project, it's always possible that there were other contributors who you didn't work with directly.

Be sure to include a link to the **FigJam file** in the meeting invite in case any of the participants are unable to attend the live meeting. You can still solicit their feedback asynchronously.

3. **Facilitate the meeting**
   a. **Recap the project/scope**
      i. At the start of the meeting, recap the project and the scope that this retrospective will cover.

         - What was the agreed upon goal?
         - Which teams were involved in executing the project?
         - What did the final product look like?

   b. **Agenda**
      i. Give an overview of the agenda for the meeting. For example:

         - "We'll spend 10 minutes adding our thoughts to the provided sticky notes."
         - "Once the 10 minutes are up, we'll walk through each note, and contributors can elaborate on their thoughts/feedback to the team."
         - "Once we've reviewed all of the feedback as a group, we'll summarize takeaways/action items."

   c. **Tutorial**
      i. Make sure everyone knows how to interact with the file. You can either share your screen to demonstrate, or remind participants that they'll need to take these steps to add their feedback to the document:

         - Click the **Select Tool** (cursor icon) in the toolbar at the bottom of the page (or press V).
         - Double-click directly on the sticky note to prompt the text box.
         - Be sure to click the **Show/Hide author** button on the far right of the text editor toolbar when adding a note to the file. This ensures that your name is documented as the author of that piece of feedback/idea.

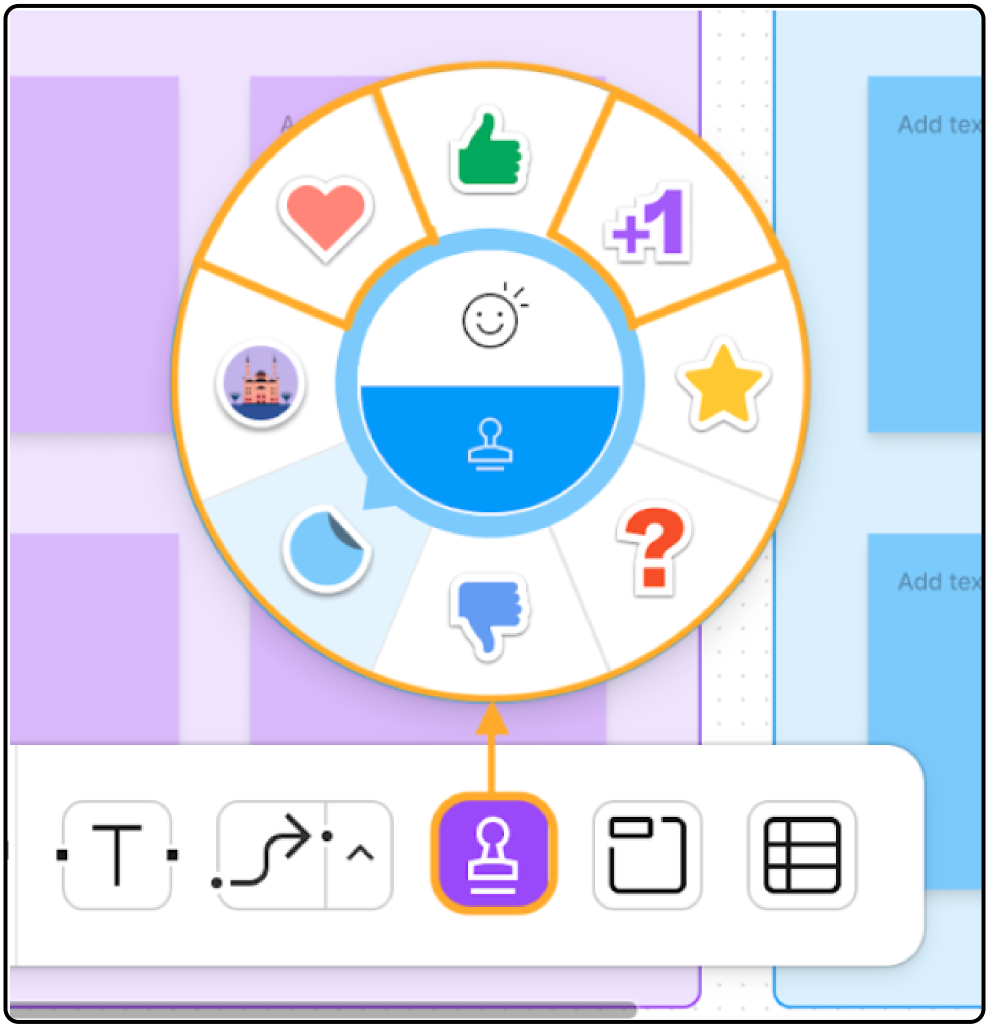
- Once the feedback has been provided, click anywhere outside of the sticky note to close it.

d. Stamp Feature

i. Encourage your colleagues to make use of the Stamp feature to help avoid duplicate stickies. For example, if the feedback they want to provide has already been added, they can Stamp their colleague's note with a **heart** or **+1.**

ii. Use the stamp feature:

- Click the **Stamp** button in the bottom toolbar, or press E.
- Choose the stamp from the wheel.
- Click on the sticky to add the stamp to the file.

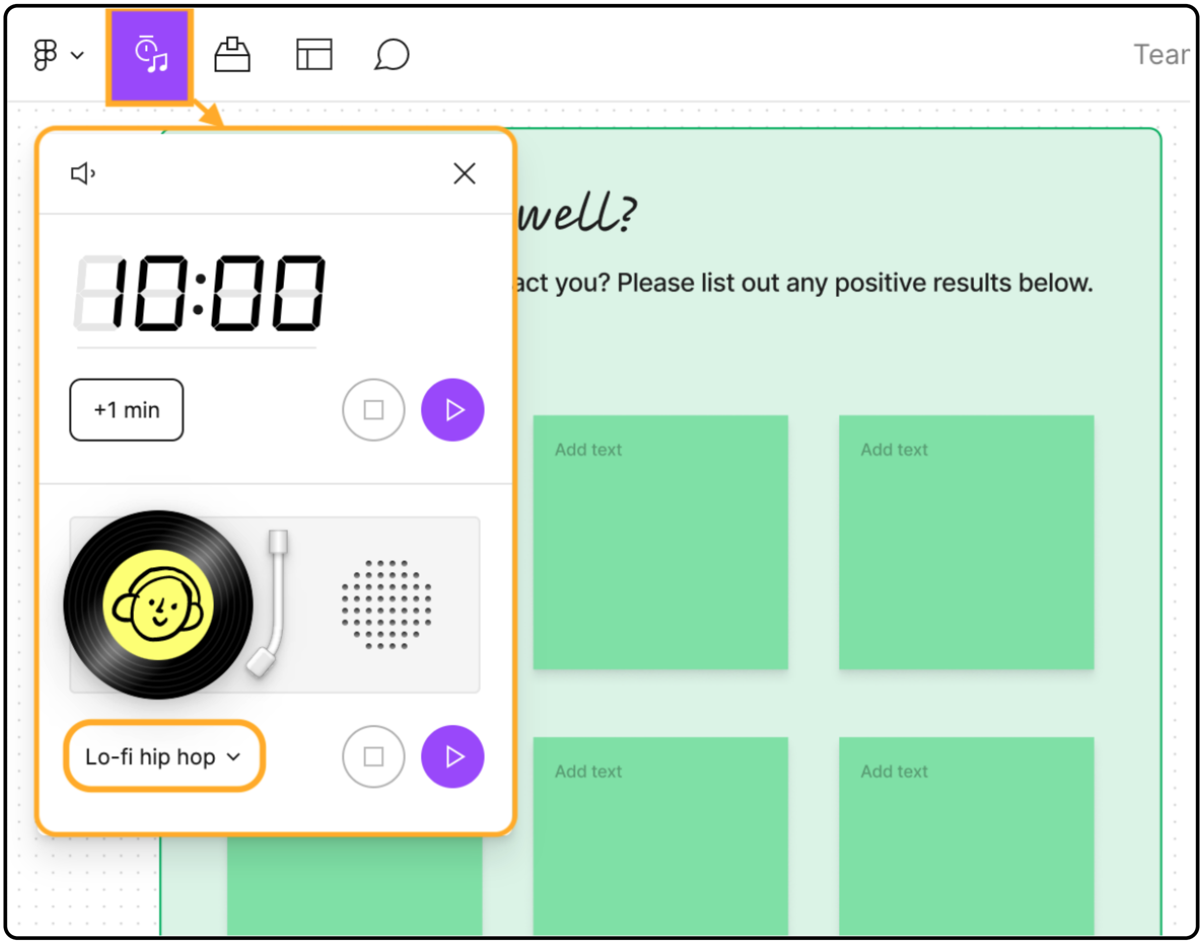


- To close the stamp, click the **Stamp** button in the bottom toolbar, or press Esc.

e. Timer

i. Once the 10 minute brainstorm session begins, make use of the built in timer so that everyone can stay on track:

- Click the clock/music note icon in the upper left-hand corner of the page.
- Type ‘10:00’ into the provided timer.



- Press **Play** to start the timer.

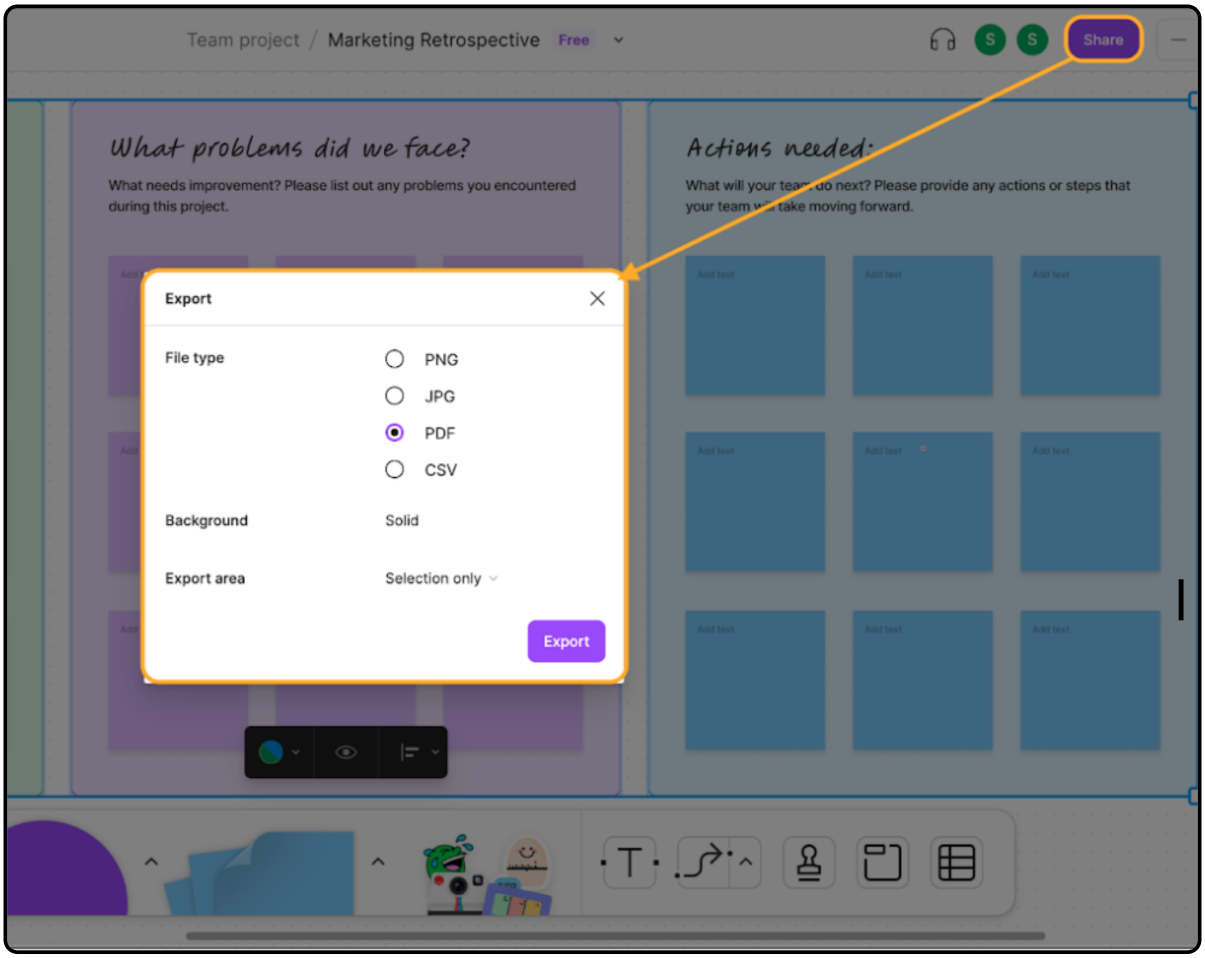
Optional: Use the dropdown at the bottom of the pop-up to set the tone for the timer *(participants will have the ability to mute the music on their end if they prefer to work quietly).* Make sure to press the **Play** button for the music option. It will automatically turn off when the timer buzzes.

4. Summarize and document

Once the meeting is over and all of the feedback is collected, we recommend exporting the file and sending a follow-up email to the original event invitation summarizing the agreed upon action items.

a. How to export:

- Select all three squares , and their sticky notes, by clicking and dragging across the file elements.
- Click: Command + Shift + E **(Mac)** or Control + Shift + E **(Windows)** to prompt the export window.
- Choose PDF as the File Type.



- Click **Export**.

b. Email Summary

i. In addition to sharing the file with the meeting participants, summarize key action items in the body of the email (especially if there are assigned next steps for different meeting participants).

Tip: We also recommend saving this PDF to the project page in our internal wiki. This resource helps future teams who may complete similar projects in the future. They can review your team's learnings to inform their approach!