Facilitator Cheatsheet

Prepare

Finalize your capability template ☑

Choose Facilitation Mode & schedule the assessment in a retrospective

Together: Everyone takes it together in real-time (2.5 Hours)

Separate: Everyone takes it separately (1.5 Hours)

If it is a subsequent assessment, review previous assessment results (i.e., impediments/goals, notes, etc.)

Set the Stage

- Communicate the Purpose: 💬
  - Challenge ourselves
  - Voice your feelings in a safe place.
  - The value is in the conversation, learning, and improving.
- Explain Capability Voting Guidelines:
  - Read criteria from left to right, starting at **"Developing"**, until you encounter relevant criteria that you feel is not satisfied or not exceeded. Select the checkbox for the previous stage.
  - Select criteria checkboxes in the next stage that you feel are also satisfied or exceeded. Then click **"Submit Vote"**.
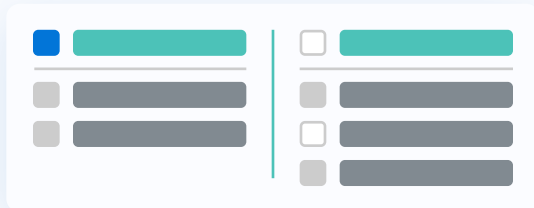
- Encourage participants to add notes. 📋
- **All Votes and Notes are Anonymous.**

Gather Data

Together Mode:
- For each capability
  - Give participants 2 to 3 minutes to read and vote.
  - Ask a probing questions when there is high vote variability. ❓
  - Override the Average Rating when consensus is reached.
  - Mark the capability as an impediment if the participants feel they cannot improve because of something out of their control. 🚫

Separate Mode:
- Track responses in Manage Assessments.
- Save assessment results when completed. 🔖
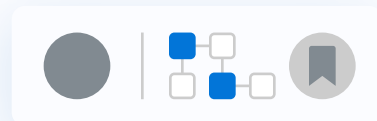
Generate Insights

Review notes and votes before participant results review.
Participant Results Review
- Insights Canvas Dashboard Gadgets
  - Snapshot - Entity Rating
    - What is our current state? Are we improving?
  - Scoring Summary - Dimension Ratings
    - What are our strengths and weaknesses?
  - Capability Rating Gadgets: Drill down when more insights are needed:
    - Performance: What are our highest and lowest performing capabilities?
    - Vote Variability: Where do we disagree and why?
    - Override the Average Vote when participants reach a consensus.
  - Add Notes: Capture conversations by adding notes on the relevant capability
  - If it is a subsequent assessment, review Previous Goals and Impediments
    - Goals: Did we improve where we said we were going to improve? ◎
    - Impediments: Have blockers been removed? ⊘
  - Probing questions to help generate insights ⊘
    - "Does anyone want to share why they voted the way they did?"
    - "Can you provide examples in which the Average Stage is met?"
    - "Is this a standard behavior for us, or something we do some of the time? Is there anything in these criteria we can do better?"
    - "So do we all agree we are doing everything in this Stage?"
    - "Does anyone want to play devil's advocate?
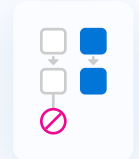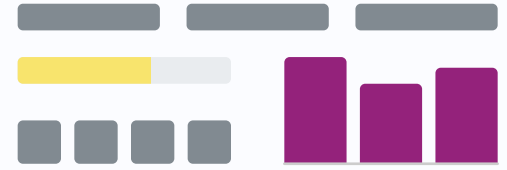
Decide What To Do

Identify the capabilities you will improve on in the next assessment cycle (i.e., quarter).
Utilize the Coaching Assistant for recommendations based on desired outcomes and context.
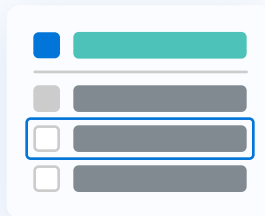
Mark Capabilities as Goals
- Add notes about "why" the participants want to improve.
- Utilize Growth Criteria and Helpful Resources to formulate an improvement plan.
- Create Improvement Actions and link them to your product backlog management system (i.e., Jira)

Mark Capabilities as Impediments
- Add Notes about "why" the participants feel they cannot improve. What is the blocker? Who can help?
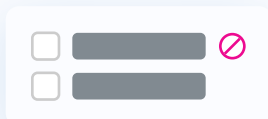
Close the Assessment

- Confirm the commitment of participants to improve!
- Document improvement plan including Capability Goals, Impediments, and Improvement Actions.
  - Send out PDF of Capability Details Dashboard
- Ongoing Review: Revisit Improvement Actions during retrospectives
- Reflect on the assessment process and improvements for next time
- **IMPROVE**