Taking the Team Meeting to the Next Level

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1.1 ABSTRACT

This paper reviews the development of both an effective and efficient tool for encouraging participation and capturing information at team status meetings: a meeting agenda presentation-framework where the participants take personal ownership of the material for which they are responsible. Effective because it helps teams touch upon all the necessary points of data and communication, efficient because it helps do it in a short amount of time and in a repeatable way.

1.2 INTRODUCTION

The team status meeting is crucial to keeping a team aware, engaged, and on-track. Simplifying the process of presenting and reviewing the team data can make it more effective and less time consuming. Making this process interesting, and even a little creative, engages team members and enhances their overall experience.

The team status meetings of those teams who are coached by the Naval Air Systems Command (NAVAIR) Process Resource Team (PRT) have evolved over time into more relevant and easier to understand formats; the most innovative of which are turning a mundane chore into a pleasant exercise. This paper will describe the PRT approach to team status meetings through the use of an enhanced PowerPoint-driven agenda.

While the PRT chose PowerPoint, any presentation-friendly software should do.

1.3 THE ORIGINAL TEAM MEETING

Going from the traditional to the introduction of the Team Software Process

The first team meetings used the traditional one-page meeting agenda. This was a list of general meeting topics which was distributed either in an email message prior to the meeting, or as a paper handout at the start of the meeting. They were typically short and looked something like this:

AGENDA

1. Call to Order
2. Management Minute
3. Project Status
4. Roles
5. Individual Status ("around the table")
6. Goals and Risks Review
7. Action Items
8. Oh-by-the-ways
9. Adjourn

At best, one or two people read the agenda in advance and the rest just glanced at the handout as the meeting began. It quickly became apparent that, as the agendas rarely changed and neither the email nor the paper copies were being read; this was not much more than a check-the-box element of the meeting.

Unsurprisingly, the meetings that flowed from these agendas were not particularly effective. There was usually only cursory preparation and the overall project status was typically delivered by displaying the live version of whatever tool the team was using to track their project. The Team Software Process™ (TSP™) style Role Manager [1] reports were occasionally printed on handouts, but were more often just spoken, with a brief period afterwards for questions. Worst of all, the status reports from the individual team members were all delivered verbally, and were usually not interesting, memorable, or useful. While this format may have worked for getting across a sense of the status of the project, it didn't provide any depth of understanding, and worse yet; most of the status information wasn't being captured in the minutes.

1.4 THE POWERPOINT-DRIVEN MEETING

Going from live data to screen shots and the capture of historical data

At NAVAIR, the spirit of the TSP and the Team Process Integration (TPI) [2], an instantiation of the Capability Maturity Model® Integration (CMMI®) based upon the TSP, prompted a search for a better way to conduct team meetings and to capture their value to the team.

After understanding the shortcomings of the traditional approach to agendas, the first step to improvement was to transcribe the agenda in a PowerPoint slide set and expand it. The design for this was based on the typical TSP project planning (aka 'Launch') management out-brief used at NAVAIR, with each meeting topic and role getting its own slide (Figure 1).

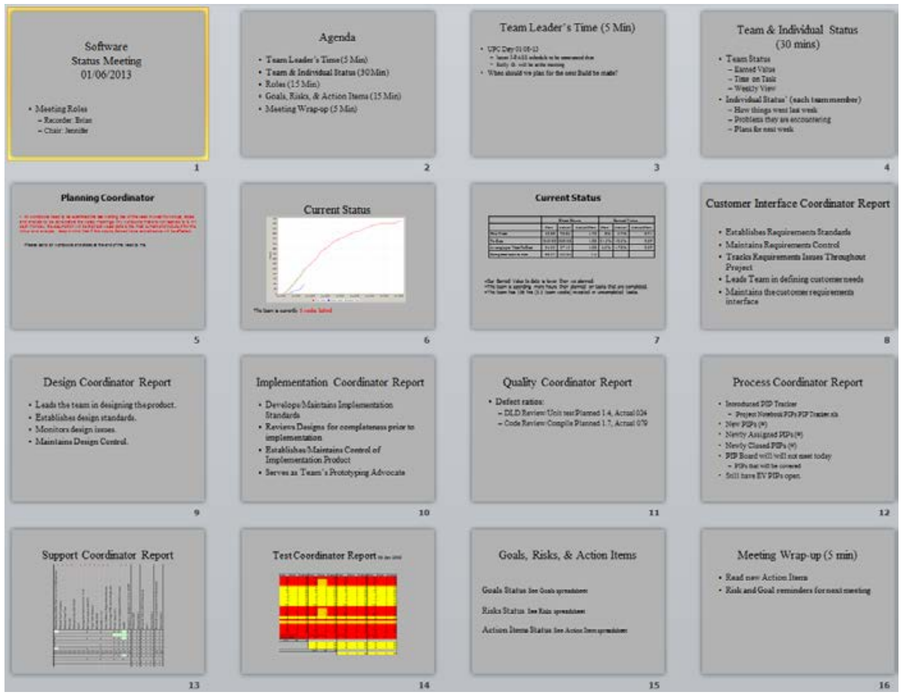

Figure 1: An example of an early PowerPoint driven meeting agenda.

Team status information was now presented on a screen where the meeting attendees could inspect it, ask more probing questions, and develop a better understanding of the situation. The team leader could draw from it when compiling their periodic status report to management, and better yet, it was being captured and could be archived for the historical record. Even though the statuses of the individual team members were still given verbally, the new format was a definite improvement.

1.5 THE PERSONAL SLIDE

Going from apathy to interest

There were, of course, issues with the new format. The meeting chair controlled the appearance and content, and it was seldom visually appealing (Figure 1). This might not seem like a significant problem, but it didn't encourage the attendees' attention. Occasionally it didn't have the appropriate level of information for the Team Role reports. This was an issue where new Team Role Managers struggled to practice their roles and develop enough understanding to summarize and present the most pertinent information. Those Role Manager reports could undermine the utility of the team meeting by being either unnecessarily long or focused on irrelevant data. Additionally, since the presentation was one slide-set, and team members tend to wait until the last minute to update their status, people were unintentionally interfering with each other's access to the slides. This led to feelings of frustration and to some people abandoning the effort to update the slides altogether.

To resolve these issues, two changes were made to the new format. They fixed the particular problems they were meant to address, but they also had unexpected side effects: ownership and interest.

The first change was to divide the single agenda-presentation into multiple presentations, each the responsibility of only one person. The whole assembly is located in a team status meeting folder on a network shared-drive that is accessible from both the individual work stations and from the room where the meetings are held (Figure 2).

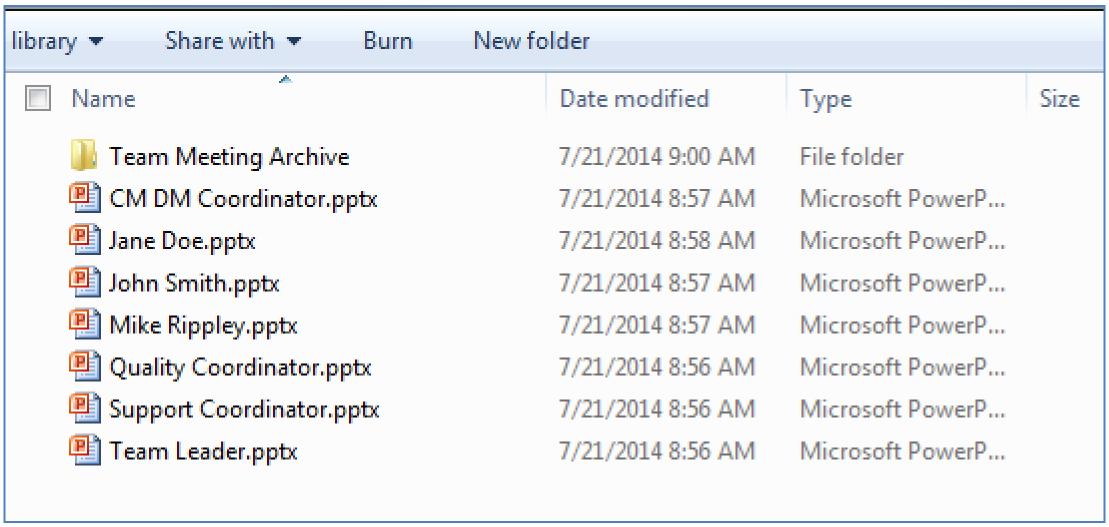

Figure 2: An example of a team meeting folder on a shared drive with Team Leader, Role Manager, and Individual status reports. The core of this set of presentations is the Team Leader presentation.

Being located on a shared drive eliminates many of the issues associated with accessing, updating, and presenting team status information. While each person having their own status presentation can add up to a lot of files, the advantage is that everyone can update their project status without file-access-interference from other team members. The presentations can be projected for review during the meeting and they can easily be archived by copying the folder for the current week and renaming it accordingly.

1.5.1 The Team Leader's Report

At the core of the team status meeting is an overall agenda presentation controlled by the team lead (Figure 3). It includes the complete agenda with embedded links to the supporting presentations from the Role Managers and individual team members.

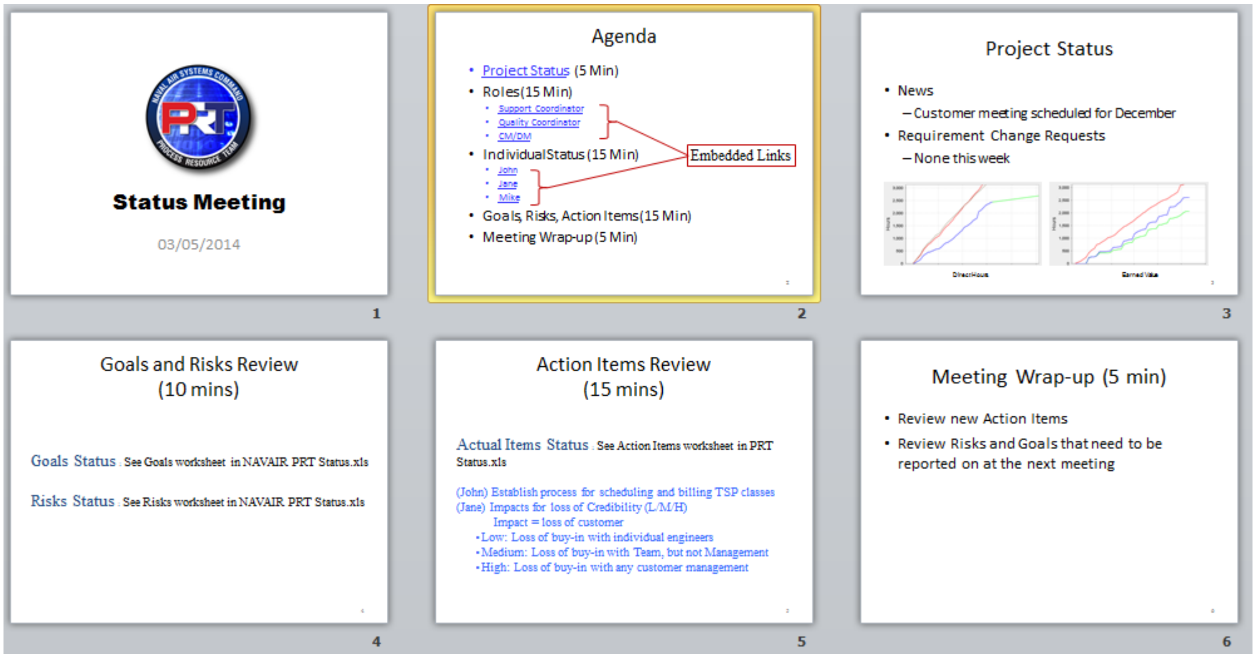

Figure 3: An example of a Team Leader core-presentation with embedded links to the Role and Individual presentations.

All the necessary agenda items are covered in a regular pattern with minimal disruption from moving back and forth between the core-presentation and the supporting presentations. Once the meeting has been concluded, the set of presentations can be archived for the team record.

1.5.2 Role Manager Reports

An example of a Role Manager's report is shown here (Figure 4). It was taken from a non-software TPI team where the quality measures for the work they were doing were not yet defined, so the Quality Coordinator focused instead on the quality of the process data being collected.

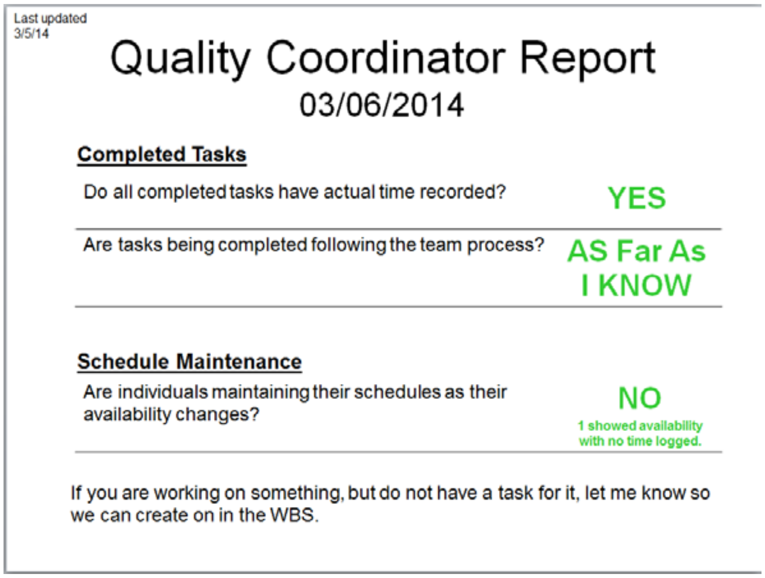

Figure 4: An example of a Role Manager Report presentation.

1.5.3 The Individual Status Report

The second change was to create a presentation for each team member to use in giving a personal status report. Those slides contain a minimum set of information as required by the team lead; displayed in both text and graphics. Now the team could both hear and read people's personal status reports. Judging from the discussions that the new presentations inspired, they appear to have improved both understanding and retention. Additionally, individual status reports were now being captured for the team record. The example shown here is from a TSP team member (Figure 5). The charts were taken from the process data collection and analysis tool chosen by the team: the Process Dashboard © 1998-2014 Tuma Solutions, LLC.

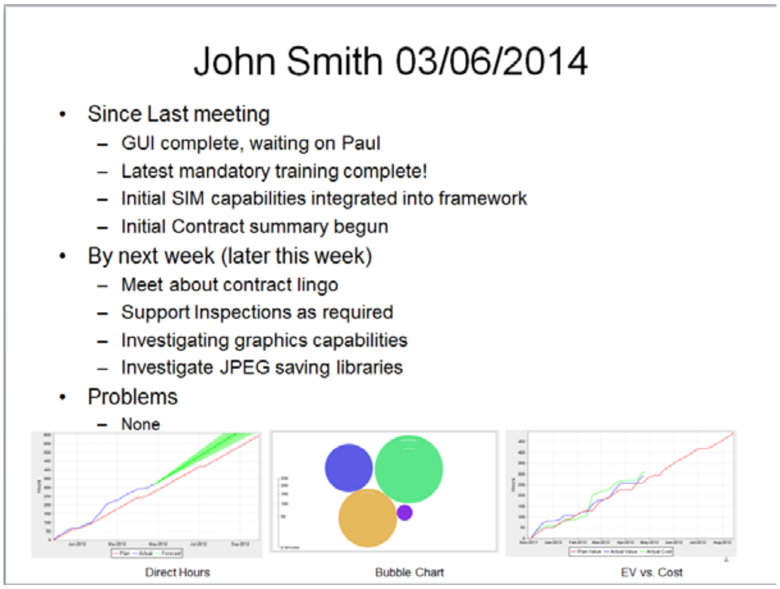

Figure 5: An example of an Individual Status report presentation.

1.6 CUSTOMIZATION

Going from good to better

Both the Role Managers and the individual team members, now responsible for the content of their slides, began to take ownership of them. They experimented with customizing the content and format of their presentations; adding and removing information as appropriate, and adding interesting backgrounds, graphics, and in several cases animation. This opportunity for personal expression had the effect of encouraging team members to keep their presentations up to date and, as a result, they became more cognizant of their data; and ultimately, more interested in what was being presented by others. For most, a mundane chore turned into a pleasant exercise.

Team members are expected to report and explain their data to their team mates and the resulting increase in transparency is uncovering issues, improving coordination, and encouraging cooperation.

1.7 CONCLUSION

Go to the next level

The team status meeting is critical to a team for developing a common understanding of the state of their project. The team leader, Role Managers, and team members should all provide a current, succinct, and easily understandable report on the status of that part of the project for which they are responsible. By changing the way the agenda was presented, the PRT helped their teams evolve their meetings into more relevant, easier to understand, and more visually interesting formats; the most innovative of which turned a mundane chore into a pleasant exercise. These meetings now have focused information presented in a manner where attendees can inspect it, ask probing questions, and develop a more thorough understanding of the situation; both of the overall project and of the status of their team mates. Even better, a complete and detailed project status can be easily captured and archived.

Set boundaries for content and propriety, then, whatever presentation-friendly tool you choose, let your teams take ownership of their status reports. By adopting a similar approach, any team can take their team status meeting to the next level: from a check-the-box activity to an entertaining and informative event.

1.8 AUTHOR BIBLIOGRAPHY

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David Saint-Amand is a process improvement coach with the Process Resource Team of the Naval Air Systems Command (NAVAIR). His previous positions include DCS Corporation Section Manager, Naval Operations Research Analyst, Engineering Geologist, and Seismic Safety Consultant. Saint-Amand holds a B.A. in Geology from the University of California at Santa Barbara with a secondary emphasis in Computer Science. He is a Defense Acquisition University (DAU) Certified Level III Life Cycle Logistician with additional certifications at Level I for Test and Evaluation Engineering, Program Management, and Information Technology. With regard to the Personal Software Processes (PSP), he is a Software Engineering Institute (SEI) certified PSP Developer, an SEI-Authorized PSP Instructor, and a NAVAIR Internal Team Software Process (TSP) Coach with over 60 Project Launches. Saint-Amand has given presentations at the North American Software Engineering Process Group (SEPG) Conference (2006) and the TSP Symposium (2006, 2009, and 2011). He is an author or co-author for five publications in four disciplines: geology, military operations, software engineering, and process improvement.

1.9 REFERENCES

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