



Continuous Improvement Readout and Planning Session for Leaders

PPT Template Facilitator's Notes

Find the below on our support site at support.agilityhealthradar.com in the article, "[How to Facilitate a Continuous Improvement Readout and Planning Session for Leaders](#)":

- Workshop Purpose
- Deliverables
- Attendees and Facilitator
- Sample Agenda
- Preparation
- Facilitation Tips
- Facilitation Template (PPT download)

Section 1: Opening

Section Purpose: Set the stage for the strategy session.

- If the participants are already familiar with AgilityHealth® (purpose and high-level process), do not cover the AgilityHealth® overview slides, or just touch on them briefly.
- Organizing Tools
 - **Activity:** Establish Team Norms for the participants, so that you have an agreement on how you will work together for a successful workshop
 - Target 3-5 minutes, with results captured on white board or poster paper
 - Potential Areas of Focus:
 - Timeliness
 - Being Present
 - Electronics by Exception
 - Respect for Others
 - One Conversation at a Time
 - High-Trust Environment, etc.
 - Review and agree upon start, end and break times
 - Check for any assumptions or questions that need to be addressed before beginning
- Workshop Purpose and Deliverables
 - Review the purpose and deliverables with participants and ask for feedback or questions
- About Me
 - Prior to the workshop, add content to the About Me slide, if you want to share more about yourself during the introduction, such as your experience, background or approach.
- **Activity:** About YOU!
 - Introductions



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- Target < 30 seconds per attendee
 - If the participants already know each other, consider using an ice breaker, such as asking a powerful question or a conducting a quick fun/thought-provoking game
- Agenda
 - Describe the approach that will be used in the workshop, beginning with a summary of observations, working together through discussion and analysis and ending with the deliverables of creating a continuous improvement plan and defining next steps.
- Moving Towards a Growth Mindset
 - Key Points: AgilityHealth® is a growth and continuous measurement platform and we are making growth intentional and part of the organizational culture. It is important to foster a growth mindset, where we are always looking for what we can learn and making time to improve. Teams need to know that leaders support and value continuous improvement and want them to take time to do this regularly. (See “Mindset: The New Psychology of Success” by Carol Dweck)
 - Fixed Mindset: “We are doing the best that we can, and we don’t have time to work on improving.”
 - Growth Mindset: “We learn from our mistakes and know that if we put in the effort, we can develop valuable skills and mature as a team.”
 - Suggested questions for discussion (if you have time):
 - Where do we see examples of a fixed or growth mindset in our organization?
 - How does this impact our performance and ability to improve?
 - What are our greatest opportunities to shift to a growth mindset?
 - How can we support this as leaders?
- AgilityHealth Growth Model
 - This model illustrates how AgilityHealth® works at every level of the organization ○ (Right hand side) Issue Escalation and Resolution for Continuous Improvement and Growth comes from the bottom up
 - Teams create their own growth plan for items that they can resolve as a team
 - Impediments and organizational issues outside of the team’s control are escalated as organizational growth items
 - Leaders that support multiple teams work together to develop a backlog from these issues that come from the teams and resolve the highest priority issues each quarter
 - Issues that are beyond the program, line of business, ART, or portfolio level are escalated as enterprise issues to be addressed by the top level of leadership
 - (Left hand side) Alignment with Business Outcomes
 - Strategic direction is set by executive leaders



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- Leaders across the organization define business outcomes that align with the strategic direction
- Team goals align with the business outcomes
- Inspect and Adapt Leads to Growth
 - Four steps in the quarterly growth process:
 - Collecting data
 - This has already taken place with the assessments the teams completed
 - Analyzing the radar and gaining insights
 - Teams have done this, now we will do this as a leadership team
 - Deciding on where to focus improvement efforts
 - What we are doing today
 - Executing and validating our plan for improvement over the quarter
 - We will create a plan for how we will do this as leaders, after we decide what we are working on

Section 2: Summary of Observations

Section Purpose: The purpose of this section is to share your observations and recommendations with the group (from your pre-meeting preparation and analysis) so that they have a starting point for their analysis and discussion.

- Pull key pieces of information from each area that the team will be analyzing into the presentation and then show them how to find the information in AgilityHealth[®], as they will be breaking into small groups and digging deeper into each area of analysis.
- Include the slides and information that you believe will be helpful.
- If the participants have experience reading and analyzing multi-team radars, you can skip this section and move right into the Section 3, where they will analyze and discuss the results together.
- See these articles on the AgilityHealth[®] support site for guidance (read prior and reference as needed):
 - [Multi-Team Data: Overview](#) (multiple articles under “Reviewing and Analyzing the Data”)
 - [How are Related Competencies Identified?](#)
- Multi-Team Analysis: Teams & Assessments Completed
 - Share the number of teams that are included in the multi-team rollup and the timeframe in which the assessments were completed.



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- If some teams did not complete an assessment for the most recent quarter (or whatever time period you are looking at), you may not want to include them in the analysis
 - Note any other information that influences the results, such as changes in team composition, completeness of the data (for example, number of team members participating, response from stakeholders, role and participant group data), etc.
- Multi-Team Analysis: Rollup Radar and Filtering
 - Highlight key observations from the multi-team roll-up, including filters by role and participant groups.
 - Considerations:
 - What is the overall pattern of the teams?
 - Are they closely grouped?
 - Are the scores consistent across the radar or are there some highs or lows that stand out?
 - Explain how to look for related competencies and identify opportunities to make the greatest impact.
- Multi-Team Analysis: Analytics Table
 - Review the analytics and multi-team analysis tables and share your observations
 - Considerations:
 - Are the top/bottom competencies coming from a couple dimensions or are they spread across the radar?
 - What story does this tell?
 - For the top and bottom competencies, is there consensus across the teams or is there a lot of variance?
 - What are the strengths and opportunities across teams?
- Multi-Team Analysis: Maturity
 - Explain the crawl/walk/run/fly scale and identify the overall maturity level across the teams
 - Considerations:
 - Are the teams more mature in some areas than others?
 - Are the teams at different levels or is there consistency across the teams?
 - Remind participants that the purpose is not to compare teams for reward/punishment but to understand where they are at collectively and to develop strategies for bringing up the maturity level across the teams



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- Example: TeamHealth Insights – Maturity

- Example: Maturity Roadmap – Recommended Plan
 - Explain how the maturity roadmap provides guidance on goals and growth plan items based on the overall maturity level of the teams.
 - Discussion points (time permitting):
 - What are some strategies that we might want to consider based on the overall maturity of the teams?
 - How can we use this roadmap to guide our approach? Do we want to create a version that is tailored for our organization?

- Multi-Team Analysis: Quantitative Delivery Metrics
 - If quantitative metrics have been gathered for the teams, show key metrics and explain how they provide additional insights on delivery performance.
 - Validate data quality and accuracy prior to the workshop.

- Multi-Team Analysis: Growth Journey
 - Highlight insights from the growth journey and note any issues with the data
 - Show participants how to drill down into the sub-dimensions and competencies within each dimension
 - Considerations:
 - Did the teams complete consistent reviews to create valid trend data? (see the number and list of teams included in each data point)
 - What are the trends in the team's maturity?
 - Are there any outliers? (large increases or decreases, relative to the overall trend)
 - Is there anything the participants should be aware of that would impact the trend? (example: change in radar questions, organizational changes)

- Multi-Team Analysis: OGI Themes
 - Review the themes you have identified across the organizational growth items
 - Considerations:
 - What items have the teams tagged as “very high” or “high” priority?
 - What area(s) on the radar are the greatest number of the OGIs related to? How does this relate to radar analysis?
 - Is the number of OGIs per team consistent or are they coming disproportionately from a sub-set of teams?



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- If the teams have completed multiple assessments, what trends do you see in the OGIs that are being raised? Are the same issues coming up? What is new or different?

Section 3: Analysis and Discussion

Section Purpose: The Continuous Improvement Leadership Team will analyze and discuss the results to gain further insights and draw conclusions about the top growth areas to focus on.

- If the summary review naturally created group analysis, discussion and insights and the issues were captured during the discussion, then the workshops in this section can be shortened or skipped, depending on how much time is available and the needs of the group.
- Analyze Data and Share Your Insights
 - These are the areas the group will analyze to gain and share additional insights into the data. If there is no quantitative data available, remove it from the list on this slide.
- **Activity:** Radar Analysis
 - Break into small groups and assign the following topics (one per group):
 - multi-team rollup radar (with filtering)
 - analytics table
 - maturity level and roadmap
 - quantitative metrics (if available)
 - growth journey
 - Ask each group to add their insights to the summary that was shared.
 - Plan for 10 minutes for small group discussion and 20 minutes (total) to share back with the larger group.
 - If you skipped the prior section and went straight to the group analysis and discussion, allow for more time.
 - Note that you are not analyzing the organizational growth items at this point.
- What are the teams asking for? Analyze the OGIs
 - These are the steps that the team will go through in analyzing and refining the OGIs created by the teams. If they are new to this, you will need to demonstrate how to edit, add, and group growth items.
 - See the article [“Continuous Improvement Plans: Overview”](#) on the AgilityHealth Support Site for detailed instructions on viewing, pulling, adding, editing and grouping OGIS.



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- Identify Themes: You may have already identified themes, but the team needs to review them and make adjustments if needed.
 - Review Each Growth Item: This is an opportunity for the team to read through each of the growth items and gain a detailed understanding of what the teams are asking for.
 - Group Closely Related Items: If multiple teams have identified similar issues, they can be grouped together in AgilityHealth to create a de-duplicated list.
 - Optional: Identify the affected teams for each growth item by editing the list of affected teams.
 - Clarify the Description & Add Acceptance Criteria: Edit the user story and acceptance criteria for the growth items, as needed, to provide clarity. Participants may need to follow-up with the teams for additional information about what they are asking for, if team representatives are not attending the workshop. Capture this as an action item.
 - Add New Items if Needed: If some critical impediments or opportunities were identified from the data analysis that were not raised by the teams, the leadership team can add additional growth items to capture the issues. For issues that need to be escalated to senior leadership, change the type or create a new Enterprise Growth Item.
- **Activity:** What are the teams asking for? OGI Analysis
 - Break into small groups to analyze the organizational growth items.
 - Have the groups choose one of the themes that you identified during your preparation for the meeting and work on the growth items within that theme.
 - You may want to ask leaders to pair based on their area of expertise to focus on growth items related to their area, such as Agile, DevOps, Management, Product, etc.
 - Have each group review and clarify the stories and acceptance criteria, group closely related items and add new items if needed.
 - If there are a large number of OGIs for each group to work with, have them begin by narrowing the list down to the items that they feel are the highest priority, based on the priority set by the teams and the discussion and analysis leading up to this activity. This will allow them to focus their efforts and not spend time working on items that will not be addressed in the quarter.
 - Plan for at least 15 minutes for small group discussion and 15 minutes (total) to share back with the larger group.
 - If there are a large number of growth items and/or they will need a lot of work, allow for more time for this workshop or capture follow-up actions.

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Section 4: Growth Plan & Next Steps

Section Purpose: The Continuous Improvement Leadership team will use the analysis and insights they have gathered to identify the top issues they want to work on and develop a plan for how they will work together moving forward to complete their plan.

- **Activity:** Prioritize Top Issues
 - Prioritize the list of OGIs and select the top 1-3 issues that the team agrees to work on this quarter. Make sure that you have agreement from everyone on the team.
 - Facilitation Tips:
 - Make sure all of the OGIs are visible to the group (ex. one sticky note for each issue)
 - Prioritize and rank the list (use of dot voting is recommended)
 - Gain consensus on the top 1-3 issues to focus on this quarter (consider using Fist-to-Five)

- Refining the Top Issues
 - The issues that the team will work on this quarter may need additional refinement to be provide clarity and readiness for the team to start working on them.
 - Is this an epic or a story?
 - The team will need to determine whether the issues they have selected are epics that will need to be broken down into smaller pieces to be worked on in an iteration. There will likely not be time in this meeting to break epics down into smaller stories during the workshop, so capture this as an action item.
 - Do we agree on the acceptance criteria?
 - They need to have clarity on what they are agreeing to do, by reviewing the acceptance criteria and updating, if needed, to gain consensus.
 - How will we measure results?
 - They need to have clarity on what they are trying to impact by working on this item - how does this support performance, health and maturity and how will they know if it created the expected outcome? Defining measures allows us to learn from our efforts as we continue to inspect and adapt. (This is not about rewarding or punishing teams or leaders!)
 - Who will take ownership?
 - They will need to leave this session with clarity on who is taking the lead on each of the items. Encourage them to pair up and work together.

- **Activity:** Refine the Top Issues
 - Facilitate a discussion/activity with the group. For each OGI that the team has selected:
 - Understand the size (epic or story)

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- Confirm agreement on acceptance criteria (update if needed)
 - Define measurable results (competency targets and measures)
 - Identify an owner/paired ownership
 - Capture the results of the discussion as decisions or action items.
- Leadership Checkpoints
 - Explain how the continuous improvement leadership team will use Agile to align their processes and leverage best practices used by the teams they serve.
 - A typical pattern for a continuous improvement leadership team would be to adopt 2-4-week sprints, with a planning meeting, stand-ups once a week and a demo back to the teams at the end of the quarter on what was accomplished.
 - The team will likely need some support from a coach or other process expert as they learn how to use Agile.
- **Activity:** Design Your Agile Ceremonies
 - Facilitate a discussion with the group to determine the ceremonies and cadence that they can agree to and encourage a quarterly demo to the team to show resolved impediments.
 - Capture the results of the discussion as decisions or action items.
- **Activity:** Plan for Next Steps
 - Facilitate a discussion with the team and record next steps for setting up the Agile ceremonies and beginning work on the continuous improvement plan.
 - Capture the plan on a poster paper and include:
 - Who – who is taking lead/primary responsibility?
 - What – what are they agreeing to do?
 - When – when will it be done?
 - Follow-up – how will we know it is done?
- AgilityHealth Support Center
 - Show the participants where they can find guidance on the AgilityHealth Support Center at [“Getting Started by Role: Managers/Leaders”](#)