AHF Facilitation Checklist

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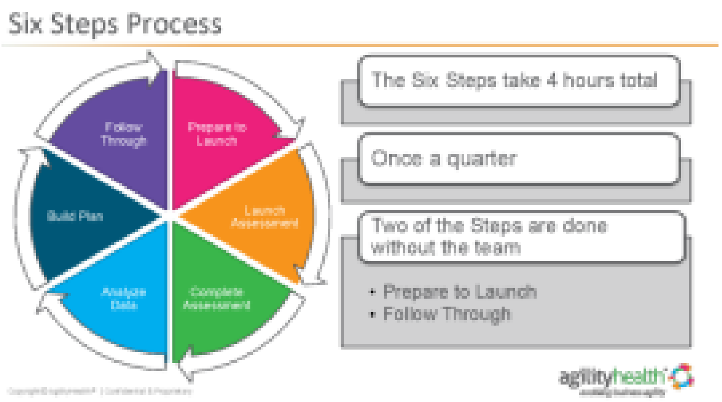
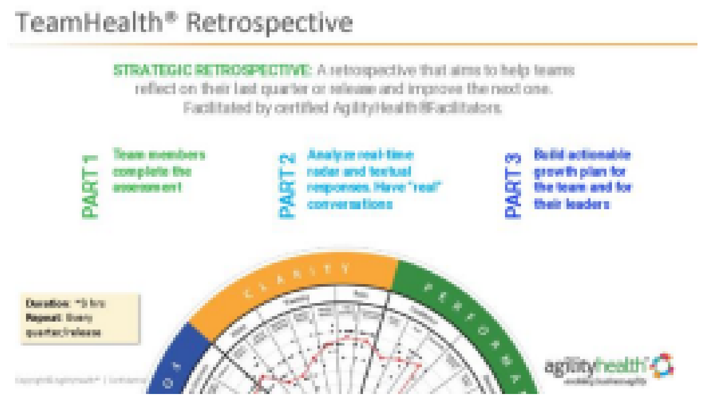




Retrospective

STEP 1 - **Preparing for the Retrospective**

□ **Meet with the Scrum-Master: -**

- Confirm Team members are correct
- Ensure Stakeholders are added
- Determine what approach they want to use for the Retrospective (see approaches below)
- Determine when they are going to schedule the retrospective.
- If using approach 1, when they'll want to schedule both meetings, ensuring there are no more than 5 days between taking the assessment (1hr) and the Retrospective (parts 2 & 3) (2hrs)
- Share with them the email template (see appendix below)

- Ensure they’re prepared to answer the quantitative questions if applicable (Quantitative Questions)
- Let them know to look up the answers in Jira, remind them if they don’t have it to rate it a 1 vs. selecting N/A, this is just a baseline, they’re not expected to have all the metrics, this will allow the team to see growth overtime.)

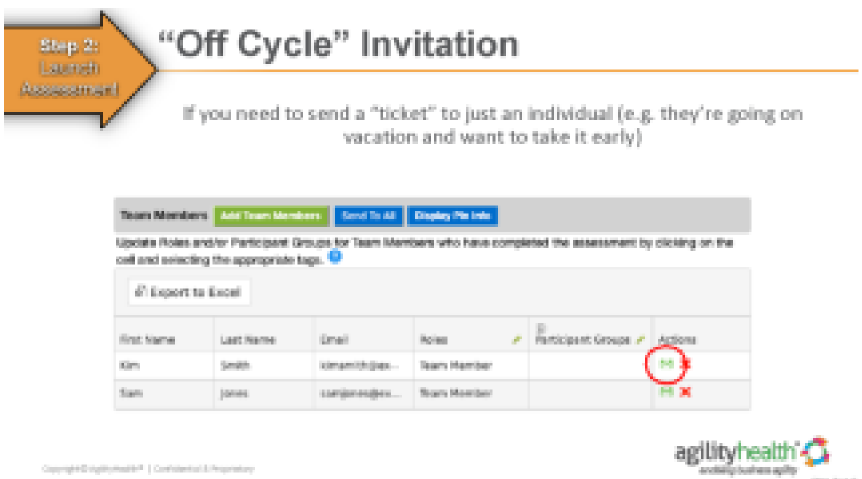
STEP 2 - Launch the Assessment

□ **Create an assessment** (Follow this tutorial)

- Select **TeamHealth 4.0**, facilitation date = date of retrospective (2nd meeting)
- Launch the assessment to the Stakeholders (Select stakeholders prior to publishing the assessment)
- Start Date = the Date you want to open it up to stakeholders to complete the assessment, usually a week ahead of retrospective, if it’s sooner that’s okay
- End Date = the Date you’ll do the retrospective

□ Ensure the PO or yourself as an AHF if you know the group is letting the stakeholders know to please complete the assessment so it doesn’t end up in spam for them.

□ Someone is going on vacation or needs to receive their assessment earlier than the retrospective date? You need to send them the email, you can select an email for one person at a time.



□ Please know scrum-masters have already been trained on their role.

STEP 3 – Complete the Assessment

□ Use the TeamHealth Retrospective Template Deck

- You can play this video to introduce Step 1 (Taking the Assessment) (Assessment Preamble)
- Who should be attending this meeting? Who is part of the team?
  - Product Owner, Team Members, Scrum-master. (See Appendix)

STEP 4 – Analyze the Results

□ Team members receive an email giving them access to the retrospective results after they complete their assessment from ‘email@agilityhealthradar.com’.

- You’ll need to ensure Team Members who didn’t complete the assessment have access to the results by going to edit team and adding the checkmark next to their name prior to the retro. □ Start by introducing the radar and helping them understand how to read it. Click on the link above to be reminded of how to analyze the radar

□ If you’re not comfortable introducing part 2, there is a Strategic Retrospective Preamble that you can play instead.

□ Follow the process outlined below (this can also be found in your TeamHealth Retrospective Template deck)

Facilitating Analysis conversations

• The team members go through the results of the assessment individually
• Or you can break them into small breakouts around the dimensions
• Jot down top growth items using idea board (Prevents group think)
• As a group review the idea board and group similar ideas together

• Allow everyone time to read the grouped items
• Give them a limited number of votes (2-3)
• Identify the top growth items and discuss those
• Identify if any of them are organizational growth items
• Ask group to identify 1 item leaders can help with if none identified

• Build one organizational item together with the team
• Breakout the team members to build out the remaining growth items
• Leave time for each group to share & Assign owners to each item

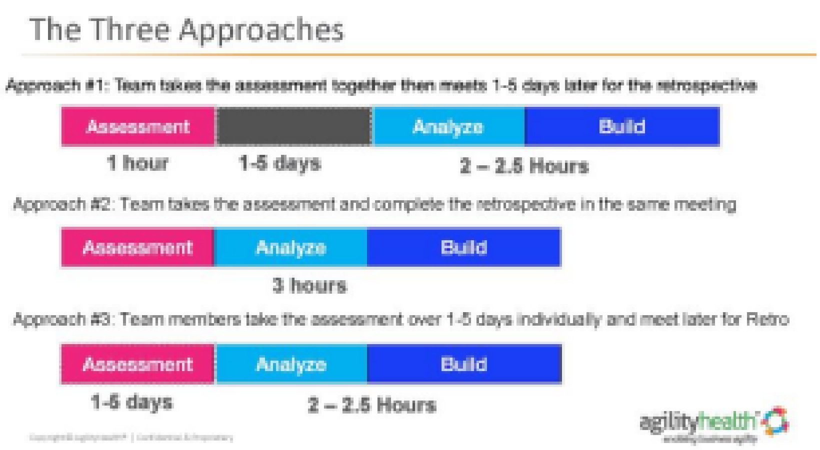
□ How to add growth items?

□ Additional questions not found here? Please search Support.agilityhealthradar.com most answers will be found on there.

Appendix

Retrospective Approaches

(Please use Approach #1 or #2 for the first time)



Invitation to Retrospective for Team Members

Subject Line: AgilityHealth® Team Retrospectives

Dear Team Member:

As a reminder, your team has been selected to participate in an AgilityHealth® Retrospective. Please attend your retrospective session at [DATE] and [TIME]. The final output of this session is a Team Growth Plan with actionable items you want to achieve within the next quarter and Organizational Growth Items you want Leadership to address.

You will need to bring a laptop to participate in the Retrospective

Desired Outcomes:

- Analyze your radar results and engage in an open/honest conversation about your strengths and growth opportunities.
- Develop an actionable growth plan for your team for the next quarter/release.
- Let Leadership know where they can help you.
- Have FUN!

Post Retrospective:

- We'll ask for your feedback on the session.
- We'll share your Organizational Growth Items with Leadership so they can take action. ● Your ScrumMaster will help pull any improvements you identified into your next retrospective. Thank you for participating in the AgilityHealth® Retrospectives!

Pre-Assessment Email to Stakeholders about Assessment

Subject Line: AgilityHealth® Assessment - Your input is needed!

Hello!

As you may know, we are launching AgilityHealth® assessments for our teams. You have been identified as a Stakeholder for a team or teams, which means you will receive an email or emails on [DATE] with a link to a short assessment on how you think the team is performing.

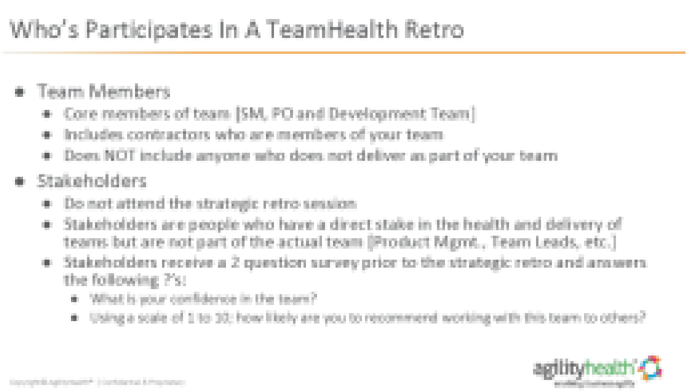
The assessment is very short and typically takes no longer than 5 minutes. **Please complete each assessment you receive by [DATE],** as this will allow the teams to review the results during their retrospective sessions.

Your input is anonymous and is a critical part to the overall assessment results and team growth plan. Please provide constructive feedback as we are excited to use the results to help the team and program grow.

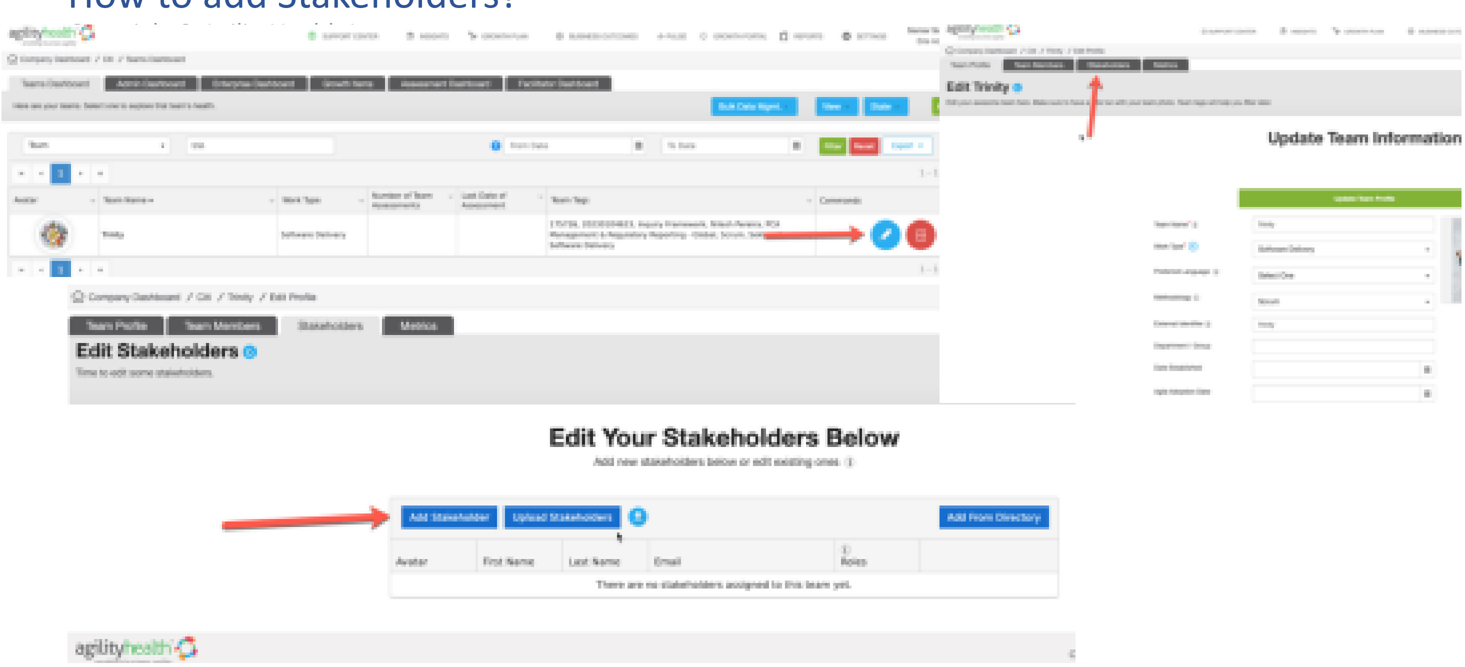
More information about the platform can be found at www.AgilityHealthRadar.com. Please

connect with any questions or comments!

Who Participates in the TeamHealth Retrospective



How to add Stakeholders?



Reminder Email for Retrospective to Team Members

Subject Line: DONT FORGET - AgilityHealth® Team Retrospective Reminder

Dear Team Member:

DON'T FORGET that your team has been selected to participate in an AgilityHealth® Retrospective.

If you are the ScrumMaster or the Product Owner of the team and your team is taking the TeamHealth Assessment, you may be asked to provide answers to the quantitative questions during to the retrospective. The TeamHealth quantitative questions can be found here.[pls link to TeamHealth 4.0 pdf]

We encourage you to view the Overview for Teams video beforehand, which focuses on:

- Overview of AgilityHealth
- The assessment and retrospective process
    - Taking the AgilityHealth Assessment
    - Analyzing your team results
    - Creating your Team Growth Plan
- The post retrospective process
    - Managing you Team Growth Items
    - How Leaders will manager Organizational Growth Items

Thank you for participating in the AgilityHealth® Retrospectives!

Links to Important Videos

- The TeamHealth Overview (3mins) Video and the Above the Line Video (3mins) (You don't need to play these videos when kicking off the assessment if an Overview for Teams session was already done) ○ You meet with the scrum-master and they say they haven't attended the scrum-master training, share with them this link.
- Help me Introduce Part 1 (Taking the Assessment Video Intro)
- Help me Introduce Part 2&3 (Strategic Retrospective Preamble Video)
- Link to the Overview for Teams Recording (45mins)
- Condensed Overview for Teams short Overview for Teams (10mins)
- Link to the Overview for Leaders Recording (30mins)