TeamHealth Demo

Demo Info:
Environment: **app.agilityhealthradar.com**
Company: **Company for Learning - Training**
Team: **KTLO**
Assessment: **Q4 2019 TeamHealth 2.5**

Legend: In this document, **Blue Text** indicates actions you should take when interfacing with the AgilityHealth Platform. *Italics* indicates example statements you may decide to use.

Set Up:

Search on Team Dashboard for KTLO and then switch back to swimlane view
Make sure the Q4 2019 TeamHealth 2.5 is in Summary View to start

Introduction

- *In this demonstration of the TeamHealth radar, we will touch on all the parts and pieces that make up a team health assessment, beginning with a quick introduction to how to find and set up teams. Then, you will see how the assessment is designed, what the radar results are showing, the growth plan that the team creates and how to see the team's growth journey over time.*
- *Through this demonstration, you should understand where to find teams and assessment results, how to read the radar and what you will be working with to facilitate the retrospective with the team.*

Team Dashboard

- *For this demonstration of the TeamHealth radar, we are going to look at the KTLO Team. This team is part of [Company for Learning - Training].* (**Go to**: https://app.agilityhealthradar.com/company/505/teams)
- *What you see here on the Team's Dashboard is the swimlane view. The blue swimlanes are groups of teams.* **(scroll down)** *For example, under Software Delivery we can see there are 9 teams, including the KTLO team we will be looking at today.*

- **(scroll up)** *The orange and green swimlanes are where you can view trends and develop continuous improvement plans across multiple teams, such as programs, portfolios as well as the enterprise level* **(click on the orange Product Line Team to show "Auto Product Line")**
- *To quickly find a team, you can switch to the grid view.* ***(click the View Button and choose Grid)*** *If I'm going to search for our team, the KTLO* **(search for "KTLO")***.*

Team Setup

- *I can show you how this team was set up by clicking on the edit icon* **(Click the Edit Icon) Alternatively, go to:** https://app.agilityhealthradar.com/teams/edit/7624
- *This is a software delivery team, using Scrum*
- **(Click on Team Members tab)** *The team members are listed here, with their roles and participant groups.*
    - *On this tab you will confirm that all the team members are on this list, and that the roles are correct.*
- **(Click on Stakeholders tab)** *and here we have a list of the team's stakeholders. Stakeholders are people like product managers, architects and sponsors, who provide the team with feedback.*

Team Assessments - IMPORTANT - DO NOT MAKE EDITS TO THE ASSESSMENT DURING THE DEMO

- **(Click on Return to Dashboard Button)** *Now, let's look at the assessments that the team has completed*
- **(Click on KTLO Team icon)** *There are 4 completed assessments on the team's Assessment Dashboard. Each assessment was completed when the team members responded to the TeamHealth Assessment.*
- **(Click on blue pencil to Edit the Assessment)** *By editing the assessment* **(choose [Q4 2019 TeamHealth 2.5])** *and selecting Preview, I can show you what the assessment looks like.* **(Select Preview Button or alternatively go to:** https://app.agilityhealthradar.com/assessment/15865/preview**)**

- *Now I can show you how to edit the team members who are taking the assessment. Often not all team members will be present to take the assessment. You can edit the date for the assessment in the first section.* **(Scroll down to show the team and the stakeholders)** *Here you can see the team members and stakeholders that were selected for this assessment. Team Members who are not present are not added to the team. You can add team members from this page as well. NOTE: Users cannot be a team member and a stakeholder.*
- *Now I will demonstrate those steps (Navigate to the team assessment being used for the class. Use only the assessment built specifically for the class to demonstrate these steps.)*
    - *Demo adding and removing Team Members*
    - *Demo resending the email and using the link to get the responder started*
    - *Demo Launching the Radar for the Team*

Assessment Preview

- *The assessment is organized by the 5 dimensions of TeamHealth, which you can see down the left-hand side. When I click to start the assessment,* ***(Click Start)*** *I get the first set of questions under the Clarity Dimension. There is a description of what we mean by having clarity on the vision and then team members answer each question based on a maturity scale that goes from crawl to fly.* **(scroll down to show Question 1)**
- *For instance, I might give a score of 6 for this first question if I feel that everyone on my team does have clarity on the vision and where to focus, we have a good understanding of our customer's needs but we are just getting started with aligning to quarterly strategy and goals.*
- **(Scroll down to the text box above Clarity-Planning)** *As team members go through the assessment, they are encouraged to add comments to provide more information about how they feel the team is doing.*
- **(Click on the Role drop-down and select Stakeholder and Go)** *The assessment for stakeholders is limited to two questions in the Performance Dimension.* **(Click Start button)** *They provide their overall confidence that the team will meet their current goals and also* **(Scroll Down)** *provide a net promoter score - on a scale from 1-10, how likely*

are you to recommend this team to others? Stakeholders can add comments about the team's performance as well as **(Click Section Forward Arrow)** *comments about the team's top strengths, opportunities and impediments. Stakeholder comments show up in the assessment results in orange so that the team can see them separately from their own comments.*

Assessment Results

- **(Click on Edit Assessment - AH Tab)** *Now let's go back and look at what the team sees when they have completed the assessment and they are reviewing the results during their retrospective.*
- **(Click Return to Dashboard Button and [Q4 2019 TeamHealth 2.5])** *The summary view of the radar shows the team's average score for each of the competencies of TeamHealth. To see more information, we can switch to the Detail View.* **(Click the View Toggle that says Summary to switch to Detail View)**

Detail View **(if the view of the whole radar is not clear, consider changing zoom to 75%)**

- *You can see the radar is organized into the 5 Dimensions of TeamHealth* **(scroll down and back up)***, and each dimension includes sub-dimensions - for example, clarity includes Vision, Planning and Roles. Below the sub-dimensions are the competencies, which include the assessment questions and scores. If I click on Vision and Purpose, you can see the team's average score for this question.* **(Click and then close the pop-up box)**
- *The maturity scale is also shown within the radar and you can see that it goes from 1 in the middle to 10 at the edge.*
- *The gray shading indicates the variance between the highest and lowest responses for a given competency. This allows you to see whether team members are in agreement on how they feel they're doing or if there are different perspectives. For example, the team is in agreement when there is a tight cluster* **(point out a competency with a tight grouping)***, but for other competencies the team is not in alignment* **(point out a**

competency with a wide gray band). *This provides an indicator where the team is not on the same page with a wide spread of responses, and where the team is in sync, indicated by a tight grouping of responses.*

- *The dots within each competency represent the score provided by each person on the team. The red dots and line are the averages. It's important to note that assessment responses are anonymous. If only one person has submitted responses to the assessment, the results will not be displayed.*
- *There are exceptions to anonymity in the Performance Dimension. Most of the time the Performance Dimension / Confidence / Product Owner question is only answered by one person.* **(Highlight and open the Product Owner Confidence question)** *It is possible that only one Stakeholder responded to the Confidence / Stakeholder question.* **(Highlight and open the Stakeholder Confidence Question)** *In this case, only one response will show, meaning these two questions might not be anonymous.*
- *There are a few more important things to know when reviewing the radar results*
    - *First, remember that the stakeholders answer only two questions. The average of their responses to these questions shows here, under Stakeholder Confidence.*
    - *Product Owners answer the same questions as the rest of the team, but their confidence response shows separately, under Product Owner Confidence. The Product Owner is providing their level of confidence that the team will meet their goals. Because it shows separately, this response is not anonymous.*
    - *While most of the questions on the assessment are qualitative - asking the team how they feel that they are doing - the performance measurements are quantitative - they are measured based on observation and results. For example Time to Market includes a measure of deployment frequency. Because these questions are not opinion-based, only one person on the team, such as the scrummaster, will answer these questions.*
- *If the Performance / Measurements questions are Quantitative, they are intended to only be answered by one person and one response will be displayed.*
- *Finally, it's important to make sure the team understands the roles under the leadership section. The TeamHealth Assessment gathers information on the health of the team, not of an individual. This section focuses on the experiences of the team being supported by the role, and should not be seen as reflecting on the performance of the individual.*

- *The team facilitator role is the person who provides process expertise, supports the team in working together and resolves and escalates impediments. For a scrum team, this will the scrum master* **(Click to open one of the Team Facilitator Questions)**
- *The technical lead role can be one or more people on the team who provide technical guidance, mentoring and connection to the architectural vision. You will need to ask the team who fills this role, before they take the assessment, so they can answer it with the same person in mind.* **(Click to open one of the Tech Lead Questions)***.*
- *The product owner role provides the product vision, connection to the customer and manages and prioritizes the backlog. The model for the TeamHealth assessment is for the product owner to take the assessment and participate in the strategic retrospective along with the rest of the team.*
- *For the questions under management* **(click on Leadership)***, each team member responds based on the person they directly report to. This may not be the same person for all team members, and that is ok. The results show how management as a whole is impacting team health. It is important to understand how the organization is gathering information on Leadership for people reporting to managers who are not part of the organization. For contractors, you may choose to have them answer "not applicable" for these questions.*

- *Now that you know how to read the radar, you can see that it provides a comprehensive picture of how the team feels about their health, how they are performing and their overall maturity level.*

Analytics

- **(Scroll Down)** *The next section of the results is the Analytics, which provides a quick view of the top 5 competencies that the team feels strongest in, the areas that they gave the lowest scores as well as the highest and lowest consensus competencies.*
  - *High consensus means the dots are closely grouped together and low consensus means there is a larger spread between the highest and lowest scores.*

Comments

- **(Click on Comments icon)** *The comments added while taking the assessment display in the next section. As mentioned previously, comments added by stakeholders show in orange.* **(Scroll down to an orange comment)**

Growth Plan

- **(Click on Growth Plan Icon in the Header)** *Once the team has had an opportunity to review, analyze and discuss the results, they will decide on 1-2 team growth items and 1-2 organizational growth items to add to their growth plan, also known as the continuous improvement backlog.*
- *The Growth Plan can either be viewed as a Kanban board or as a table.* **(Toggle the Grid View and Kanban view to display both views.)**
- *The team can add new items* **(click the add new items [+])** *and will indicate whether it is an individual, team or organizational item,* **(in Kanban view, hover over type indicator)** *which competency* **(in Kanban view hover over speech bubble)** *they believe will be improved if they work on this issue and then write a good user story with acceptance criteria to describe what they plan to do and how they will know it is done.* **(Open example growth item and highlight acceptance criteria)***.*
- *The organizational growth items will be made visible to the leaders who support the team so that they know what the team wants help with.* **(Close pop-up)**
- *The kanban view visualizes the status of each item and the grid view makes it easy to see the stories and export them into Excel.* **(Demonstrate exporting to Excel)***.*

Growth Journey

- **(Click on the Radar Icon to go back to the top)**
- **(Click on "KTLO Assessments" in the Breadcrumb Link)**
- *As the team completes multiple assessments over time (we recommend they do this each quarter), they will build a growth journey where they can see trends and the impact of changes that they are making.*
- *Here you can see the average for each dimension for each of the quarterly assessments this team has completed.* **(Hover over the 3 dots on Leadership)**

- *You can drill down into each dimension to see the trends by competency. Let's look at Leadership and the Product Owner Role. We can see significant growth in this area in the last quarter.*
- **(Click on Dimensions to show sub-dimensions, then Click on Sub-Dimension and choose Leadership)** *This allows you to select sub-dimensions and then drill down to competencies.*
- **(Scroll Down)** *The table below the timeline provides a quick view of all of the data points and you can also export the data into Excel.*

Wrap Up

- **(Click on Assessment Dashboard)** *Thank you for listening to this demo, you should now have a good, basic understanding of the TeamHealth assessment and radar and what you will be working with as you facilitate the retrospective with the team.*

Best practice suggestions

- Have a printout of this demo script, or your own notes, at hand.
- Keep the visuals moving, meaning, don't stay in one place too long. This should feel like a demo, not a lecture.
- When speaking to a functionality use your cursor to draw attention on the screen, and highlight text, but don't shake, circle or zig zag your cursor constantly. People will be watching the cursor instead of listening to you.
- Have anything that sends you alerts (Email, Slack, etc.) closed or have the alerts show on a different monitor
- QUESTIONS? – Don't forget to stop and ask for questions as you transition from one section to another.
- Balance questions and conversation with the timebox for the demo. It is very helpful to demonstrate functionality rather than talk to it, however be respectful of the timebox.