

PM WORLD TODAY – CASE STUDY – JUNE 2008

Editor's note: This paper is based on the experiences of the authors at Intel Corporation in the USA. While it is not a case study in the strict academic sense, we feel that this paper comfortably fits in the case studies category of PM World Today better than in other sections.

Program and Project Retrospectives in a Global Workplace

(Part 4 of a Series)

By Debra Lavell and Russ Martinelli

As in many companies today, our program and project teams at Intel have become highly distributed across the United States, as well as the world, due to the globalization of our business and workforce. Very few development teams are located in the same state or country, much less in the same building. We have teams spread out among approximately 290 locations in over 45 countries.

A significant part of the work we do at Intel is to engage with product development teams to improve their product development practices. One such method we use is program and project retrospectives to identify practices that need improving as a team marches through the product development life cycle, and to reinforcing the continuation of good practices by the team (see [part one](#) of this series for the foundational elements of retrospectives).

Although it is always most effective to bring a team together to conduct a project or program retrospective, it is many times difficult to do so with highly distributed teams. Just as we have adjusted many of our core product development practices to be effective in a distributed team environment, we have had to incorporate the 'virtual retrospective' as a method for discovering our key learnings from highly distributed teams. We consider a virtual retrospective as one that at least one person is not in the same room with the remainder of the team.

The virtual retrospective brings additional challenges for a retrospective facilitator due to geographically dispersed team members, cultural challenges, and disparate time zones that many times have few overlapping work hours. Such is the case when conducting retrospectives at Intel that include team members in the United States, India, and Israel. We find it really hard to schedule a meeting time that makes everyone happy in such a case.

Fortunately, we have learned a few tricks along the way that we pass along in this paper in the form of tips to conducting a successful virtual retrospective.

Tip 1: Planning is everything when going virtual!

The most important step to success is effectively planning your virtual retrospective. There are so many things to discuss and decide with the sponsor that it's helpful to have a useful resource,

such as Norm Kerth's book, *Project Retrospectives: A Handbook for Team Reviews*¹. The methodology used at Intel is derived from Norm's book.

As the facilitator of the meeting, you will want to discuss the following items in the initial discussions with the sponsor to ensure you have effectively planned all the logistics for the retrospective:

1. Identify the high-level process improvement sponsor and agree on the objective of the project or program retrospective to ensure you have support from the right people. It is very important that the sponsor understands the benefits of a retrospective and how you are going to use the data collected.
2. Talk about what the sponsor expects as outcomes and deliverables from the retrospective. The goal is at least one completed action plan where the team documents what they want to do differently next time in enough detail they can actually make behavior changes and improvements. We recommend that a team creates no more than five action plans.
3. Interview the sponsor about the team that will be involved in the retrospective. You will want to learn the experience level the team, where the team is in the product development lifecycle, what issues have been identified in previous process improvement efforts, and any other information about the team dynamics.
4. Discuss the retrospective process by explaining the objectives of the activities, the duration, and the timing. Next explain how you will engage the team, create a survey (if needed), develop an agenda, and identify the appropriate exercises to draw out the project or program story.
5. Negotiate who will attend and on what date. If possible, piggyback on an existing team meeting. A typical project or program retrospective at Intel lasts four to six hours. When virtual, the meeting should be split into two, three-hour meetings to ensure full participation from the team members (spare your participants the agony of spending a full work day on the telephone). As the facilitator of the meeting, you want to find a date that the majority of the development team (core members) will attend.

After the date has been set and the participants identified, agree to a centralized location for the meeting to get as many team members in a single location as possible. The other team members that cannot attend in person become the virtual retrospective participants. At Intel, many of our retrospectives are held in Santa Clara, California because it is central to most of our U.S. sites.

Tip 2: Gather virtual participants into a few locations

Try to have as many participants congregate in as few locations as possible. Reserve a **conference room at strategic locations** for participants to assemble, equipped with

collaboration devices such as a projection system to attach to a computer to display in the room. The objective is to create synergy with those in each room and then use activities to cross-pollinate ideas and collectively decide on a course of action.

Designate a facilitator for each location to keep the discussion within the rooms focused on the central topics being discussed by the team. It is easy for virtual team members to become engaged in peripheral discussion and disengaged with the central topic.

Poll the virtual locations regularly for questions and input in order to keep information flowing from the virtual members. Use online instant messaging or other i-chat software to help conduct real-time chat sessions.

Prior to the meeting, ensure all collaboration devices are in working order. Physically visit the room to test out the devices, especially the speaker phone and the projection system. Ask someone in the virtual locations to check on the other rooms that will be used as well. You want to confirm any other room logistics, such as the presence of flip charts or markers, well *before* the meeting date. Have any missing or broken equipment replaced or repaired prior to the meeting.

If it is impossible to have attendees gather in a few locations, then a 100% virtual retrospective (with everyone in conference) is possible. The trick then becomes using technology to your advantage.

Tip 3: Use technology to your advantage

Become an expert with the **collaboration software and hardware** available to you. Understand how to display collaborative presentations and practice using whiteboard capabilities to display information in real time between a whiteboard and remote PCs. The 3M Digital Wall Display Plus Series is a collaborative technology that is worth taking a look at (www.solutions.3m.com/wps/portal/3M/en_US/Meetings/Home). It is a dry-erase whiteboard with a computer projection screen for document or presentation displays.

Determine what **audio conferencing** technology is best for your particular usage. There are many PC-based client-server software solutions that can effectively handle voice conferencing as well as video and slide sharing if you don't want to use a separate audio conferencing bridge service. For a separate audio conference options, AT&T has a range of conferencing services. Additionally, Spiderphone (www.spiderphone.com) is another audio resource you may want to consider. It is a web-based audio-conferencing service which allows up to 60 participants on a conference call with full access to their browsers.

Web-based project collaboration software is essential for conducting retrospectives with highly distributed teams. One popular tool is Basecamp (www.basecamp.com). Net Meeting, a Microsoft web-based tool, is widely used to show slides, capture ideas and comments in real time, and generally to ensure meetings are effective (www.microsoft.com/windows/netmeeting). Voice over IP (VoIP) technology is becoming popular because it allows the participants to use

their laptop computers instead of an audio service. Live Meeting (formerly known as Place Ware) (www.microsoft.com/uc/livemeeting/default.aspx) is one of the most popular options available. Finally, WebEx (www.webex.com) is a free application-sharing and on-line meeting tool.

Web sites are also an important part of an effective retrospective. A Wiki is a special type of web site that makes it easy for anyone to post material or edit existing material (www.wiki.org). At Intel we use both Wikis and Twikis (www.twiki.org) to encourage and simplify information exchange and collaboration among teams.

These technologies enable you to collaborate on-line, in real-time with just a PC and an Internet connection. They are excellent for virtual retrospective meetings because they enable cross-site collaboration and most are very cost effective. The key, however, is to practice using them *before* the time you need the capability for a virtual retrospective.

Conclusion

By engaging with product development teams who are hungry for help to improve their processes, we help them find ways to work more efficiently and effectively through the use of the program and project retrospective methodology. Globally dispersed teams are becoming more common. When the teams span several time zones and encompass many cultures, conducting a successful retrospective is very challenging.

At Intel, our product development teams are located in many sites across the U.S. and the globe. By effectively using the technology and resources options available to us, we have been able to effectively draw out from the teams what is working well, what needs to be done differently next time, what we learned, and what still puzzles us. Armed with this information we have been able to develop action plans to improve and change the way products are developed at Intel.

In the next paper in this series, we will share a success story where a team has taken the learnings and applied the wisdom to their next project. We will uncover the challenges associated with taking the steps necessary to ensure lasting behavior change in a large organization.

For more information or assistance with retrospectives for your organization, you can contact us at www.programmanagement-academy.com.

References

1. Kerth, Norman, *Project Retrospectives: A Handbook for Team Reviews*. Dorsett House, 2001

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