



Grow your team with yearly meetings

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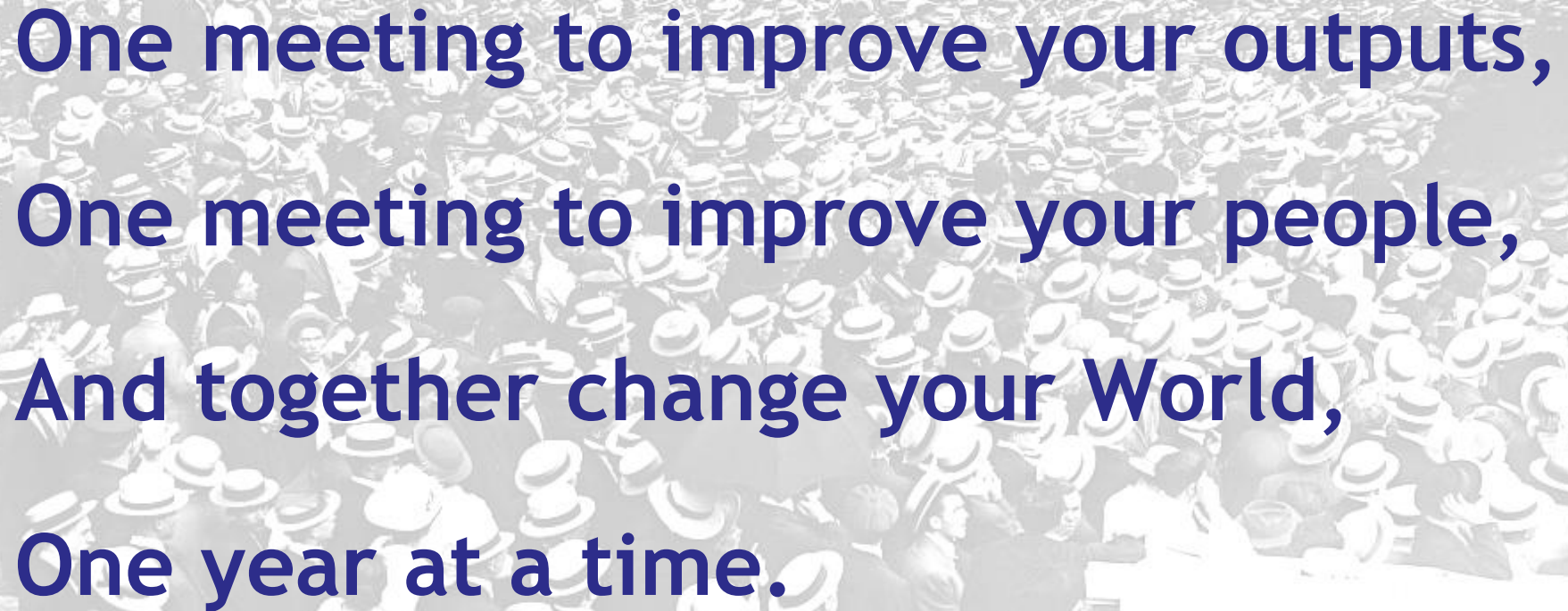


How to evolve, usually?

- People move between projects
– new challenges.
- Projects get new people
– new skills, fresh ideas.

What if...

- Same project
- Small team
- Together for 4-6 years?



**One meeting to improve your outputs,
One meeting to improve your people,
And together change your World,
One year at a time.**

YEARLY STRATEGY MEETING

Can we do more?



Information architecture

- inventory of info, including source and consumers
- methods of access per audience
- processes to maintain info
 - owner per audience?
- recover SARS study for inspiration
- statistics of usage to guide efforts
- consolidate when possible
- activate Meeting Point kb?
- information needs of users (who needs what?)

Tools

- Replace RA's work
- Catter for remote workers

Audiences

- Workshops for internal users
- Survey of new situation?
- Relations with other internal teams
- Benchmarks
- Training

Docs

- Restructure helps

Completeness of documents

- Agent desktops, connectors, APIs?
- Reorganize indicators for kinds of campaigns
- Interaction images in Visio for sales & mkt.
- Reorganize policy parameters for kinds of campaigns:
 - contact center designers? (includes delivery per switch)
- Explain mix of campaigns in contact center - like blending
- How things work, such as outbound
- Detailed processes for each kind of campaign, for troubleshooting and development.

Depth for integrators

- switches on Technet
- si-docs for switches
- routing script i/o

Past months

- Integration Server APIs
- Nurture Wikies and Technet
- Install Shield for docs
- Streamline team management (Dossle)

Contact: why

- idea of campaign kinds
- separation in audiences
- doing what can be done
- reach for users when possible
- survey directions and issues

Developers

- Quick references?
- dev-script-outbound for non-programmers
- dev-overview? - Technical comparison of APIs
- Hello world example
- Many small examples
- General programming model, such as telephony states
- help-escrpt

Information architecture

- ✓ - inventory of info, including source and owners
- ✓ - methods of access per audience
- ~ - processes to maintain info
 - owner per audience?
- ✓ - recover JARS study for inspiration
- ✓ - statistics of usage to guide efforts
- ~ - consolidate when possible
- x - activate Meeting Point KB?
- x - information needs of users (who needs what?)

KB meeting joint
 Technet Notes + Forum
 Articles/tutorials
 Usability proposals

Tools

- x - Replace RA's work
- x - Catter for remote workers

Audiences

- ~ - Workshops for internal users
- x - Survey of ~~new~~ situation?
- ~ - Relations with other internal teams
- ~ - Benchmarks
- ✓ - Training Vigit customer trainings

Docs

- Restructure helps SMALL contextual helps
- Completeness of documents
- ✓ x - Agent desktops, connectors, ~~UI/UX~~ campaign supervision
- ⊗ - Reorganize indicators for kinds of campaigns
- x - Interaction images in Visio for sales & mkt.
- ⊗ - Reorganize policy parameters for kinds of campaigns:
 - contact center designers? (includes delivery per switch)
- x - Explain mix of campaigns in contact center - ~~the~~ blending
- ~ x - How things work, such as outbound
- ~ x - Detailed processes for each kind of campaign, for troubleshooting and development.

- Depth for integrators
 - ✓ - switches on Technet
 - ✓ - si-docs for switches
- ~ x - routing script i/o

Training

- processes in simulator
- workshops

Past months

- Integration Server APIs
- Nurture Wikies and Technet
- Install Shield for docs
- Streamline team management (docs)

Contact: why

- idea of campaign kinds
- separation in audiences
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- reach for users when possible
- survey directions and issues

Marketing

- marketing writing vs. tech-writing
- brochures to overviews?
- present & get help together?

Evolution

Overviews indexes

contact center designers

Developers

- ~ - Quick references?
- x - dev-script-outbound for non-programmers
- x - dev-overview? - Technical comparison of APIs
- ~ - Hello world example
- ~ x - Many small examples
- x - General programming model, such as telephony states
- ~ - help-escript

Review previous strategy decisions:

- What was achieved, with what cost?


Meeting evolved to just consider “large” ideas:

- Items carried from previous strategy meetings.
- Wishes in backlog (too large to schedule).
- Unmet company needs in “grey” areas.

Choose a few “large dreams” to pursue:

- What should we try to do?
- What will we refuse to do?

DocsStrategy2010 < Docteam < Altinet



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Guidelines for a theory of topics

Develop and apply theory of "good topics" for the different kinds of knowledge:

- Three levels of reference/tasks, interesting concepts/processes, global overview. ✔
- Audiences and concerns of operations, systems, switches, script, APIs. ✔ **Concerns but not audiences.**
- Training that guides the writing of interesting concepts/processes, reuses others. ⚠
- Distill reference and non-reference into distinct topics in uCI ?? ✔

Write and reuse references and tasks:

- Distill pure reference topics if easy, sensible, or useful for Picasso reuse. ✔
- Write missing reference topics for Picasso. ✔ **Partially.**
- Improve integration of uSupervisor 8 reference with the uSupervisor itself. ⚠

Write interesting concepts and processes:

- Distill non-reference information into interesting topics if easy, sensible, or useful for Picasso reuse. ⚠ **Info isolated, but not rewritten.**
- Complement with new topics for Picasso features. ⚠

Evolve overview topics:

- Evolve existing operational overview to cover Picasso. ⚠
- Identify overview needs for systems, switches, script, APIs, connectors? ✔ **Identified, but not written.**

Big Points for 2010

Skills and team:

- **1** Train new team on writing techniques and strategies. ✔
- **1** Train new team on writing tools and technologies. ✔
- **1** Develop shared beliefs and principles. ✔

Typically half of what is decided gets done or started within the year.

A shared vision to guide the team:

- Large, non-trivial, shared goals.
- Criteria for what is “good”.
- Basis to say “no” to some requests.
- Not just “regular work”.

Strategy means saying “no”!



YEARLY TEAM MEETING

It's not "their" fault!



1-2 days before:

- Team members answer 3+1 questions privately.

Meeting:

- Collect answers of first question.
- Treat answers as symptoms, then look for the real issues.
- Acknowledge issues, suggest possible solutions.
- Repeat for the other questions.

Afterwards:

- Try suggestions.

- Q1) What keeps you from being as effective as you would like to be in your position?
- Q2) What keeps the unit from functioning as an effective team?
- Q3) What do you like about this unit that you want to maintain?
- Q4) What suggestions do you have for improving the quality of our working relationships and the functioning of our unit?

Q1) What keeps you from being as effective as you would like to be in your position?

Very strong question: most of the discussion happens here.

Focus on the individual members:

- Limitations of performance.
- Individual growth opportunities.

Limit “not our fault”:

- Acknowledge workload and other teams, but...
- Focus on what we can change ourselves.

Q2) What keeps the unit from functioning as an effective team?

Focus on team dynamics:

- Members raise issues that affect them and others.
- Opportunity to change team practices.

Q3) What do you like about this unit that you want to maintain?

Very strong question: answers celebrate the team!

Focus on celebration:

- Members express their appreciation for other members, and for some team practices.
- Keep what works, change what doesn't work.

Q4) What suggestions do you have for improving the quality of our working relationships and the functioning of our unit?

“Catch all”: usually all points were raised by now.

Sometimes:

- Members express appreciation for the whole meeting.
- Mutual trust improves during meeting and members express “last-minute” suggestions.

Atmosphere of mutual trust:

- Members must feel that they can speak freely.
- Acknowledge issues, even if they cannot be solved.
- One year is a good interval. People have things to say.

Issues experienced:

- First opportunity to talk (all hell breaks loose).
- Wanting to leave (and looking for excuses).
- New hire (no culture of trust yet, questions process).

One meeting to improve your outputs.

- Sense of future and direction.

One meeting to improve your people.

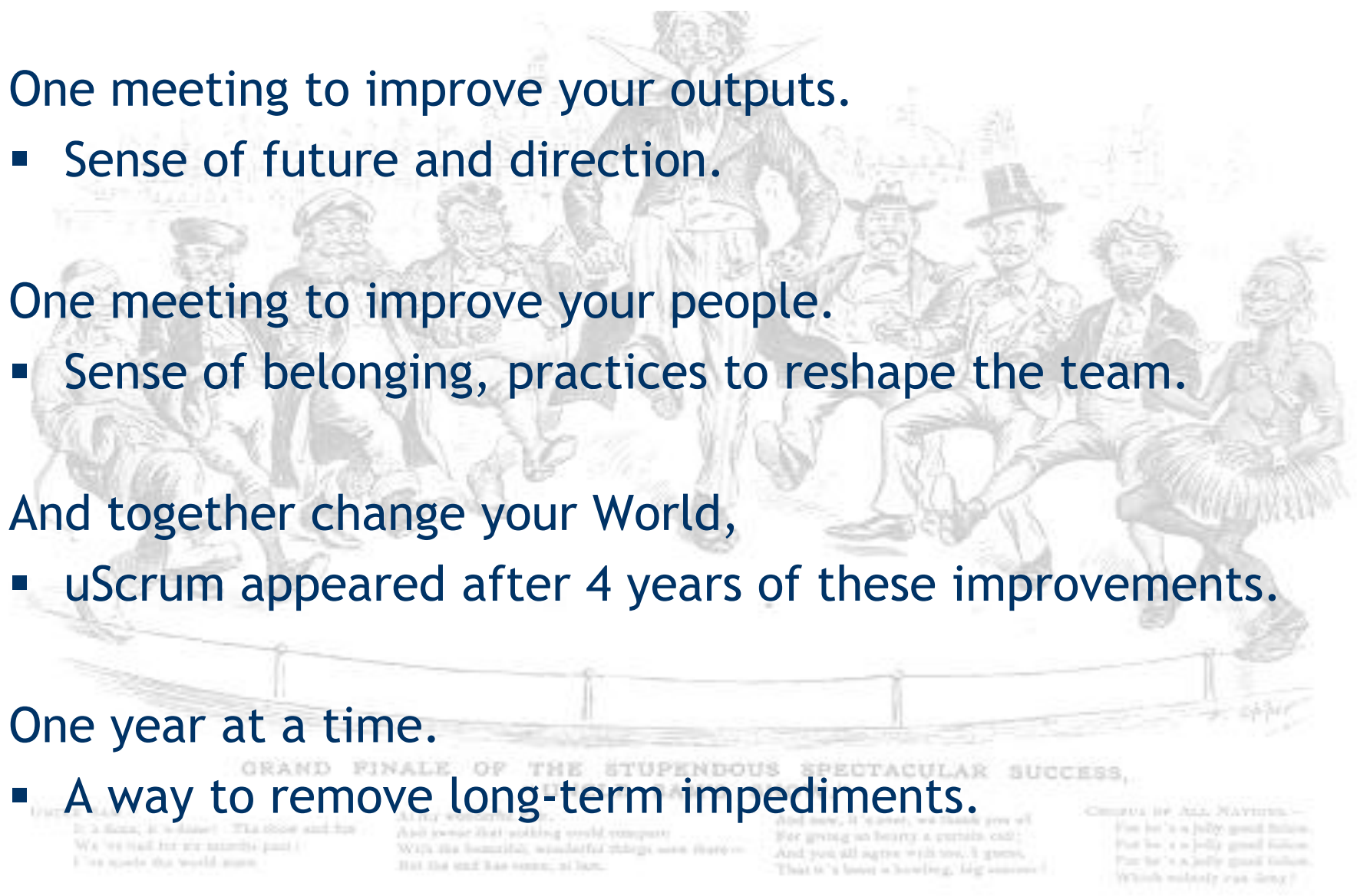
- Sense of belonging, practices to reshape the team.

And together change your World,

- uScrum appeared after 4 years of these improvements.

One year at a time.

- A way to remove long-term impediments.





Thanks!

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