

**TRUMPF**



**GUIDELINES  
for  
MANAGING GROUP-BASED  
WORK**

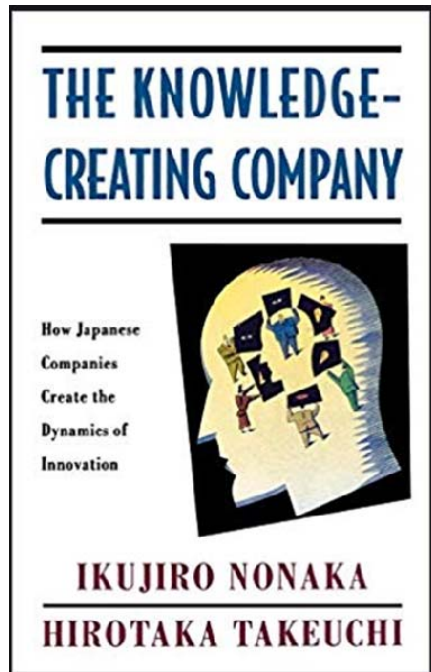
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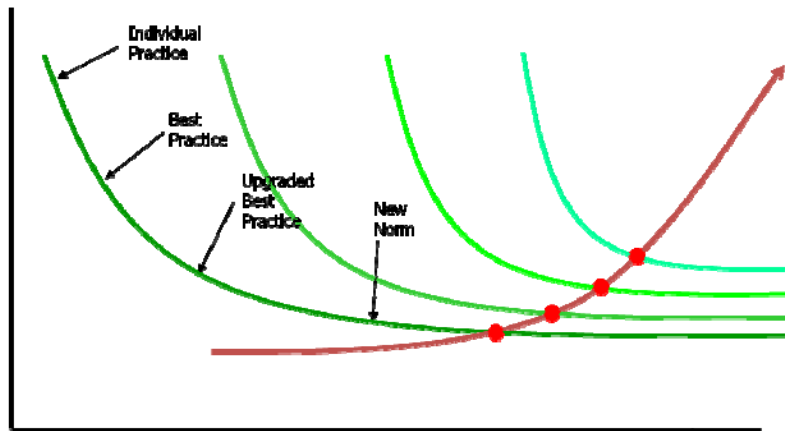
with

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**Learning Organizations Achieve Continuously Improving Results with Greater Ease Over Time**



## QUALITY CRITERIA FOR VIRTUAL MEETINGS

### Guidelines<sup>18</sup>

1. Position in a quiet space, without distraction.
2. Avoid backlighting...sitting in front of window
3. Sit in a smaller room
4. Position near the microphone
5. Use an audio headset to help focus the sounds
6. Good internet connection...preferably with wire connection not wireless
7. Look professional...not just out of bed
8. Account for set-up time prior to starting...10 minutes
9. Look at the camera when talking, not at the images on the screen.
10. Standing when on virtual creates more energy
11. Get full face into camera
12. Be aware of what is behind you
13. Contrast between shirt and wall is important
14. Mute is the default mode unless talking
15. Manage background sounds, like telephones
16. Remember, you are sharing your personality
17. Don't multi-task on the camera

It's all about knowledge creation. These notes are the result of moving tacit knowledge, gained through participating in group-based work, and turning it into explicit knowledge.

The goal is to become a learning organization where people come down the learning curve at a faster rate than the competition while simultaneously raising the bar at an ever increasing rate.

Concepts that evolved to create this dynamic are as follows:

**Manufacturing** = Lean

**Project Management** = Scrum

Scrum Inc., the world's leading authority on Scrum, the most widely used agile management framework. Founded by Jeff Sutherland, the co-creator of Scrum

**Software** = Agile

**Obeya** (large room ) & Ba (nexus)

**Rugby** is the sports metaphor. Fluid and flexible players, always adapting to the field, totally aware of situation around them, ready to carry the ball at any time. SCRUM is the face-off for the ball and requires a group of players, locked arms, pushing with all their might to an established plan.

## Principles derived from the book:

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**Decisions:** To speed-up daily decisions impacting the project in a way that allows the people who do the work to manage issues and improvements required to flow the work.

**Teaming:** Groups of people coming together focused on the project and delivering customer requirements in a way that they are flexible and fluid and can adapt to changes in the work.

**Effort:** People focus their energy on continuously improving how they work together on the project in a way that begins with self-improvement.

**Information:** To have all information required for the daily management of the project available to the people who do the work in a way that point-of-use data gathering and open sharing of needs and plans is embraced.

**Team Performance:** Groups of people accountable for delivering agreed results in a way that they can make quick and accurate decisions, have the freedom to act, are united in purpose and directed by shared convictions.

**Discipline:** To have people hold themselves accountable to one another in carrying out their responsibilities at the right time on the right things.

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## VIRTUAL COMMUNICATIONS

### Guidelines

**No bandwidth, no signal...no meeting.**

1. Have the right hardware (50% had issues)
  - Headset
  - Camera
  - Microphone
2. Get set-up well before the meeting starts
3. Be aware of background noise and glare
4. Ensure a good connection
5. Don't assume it is a "plug-and-play" world
6. Test your location for connectivity problems
7. Record meeting for people not present
8. Use in-meeting note taking for minutes and then post
9. Load meeting invitation into calendar
10. Book the "meeting room" ½ hour early so that people can come in and test the technology before the meeting begins
11. State your name each time you speak so that people know who you are...video or audio
12. Good audio pick-up is essential; don't use the laptop as a microphone
13. Build in time well before the meeting to ensure the technology is working.
14. Step-up and demand clear channels for communications to occur.

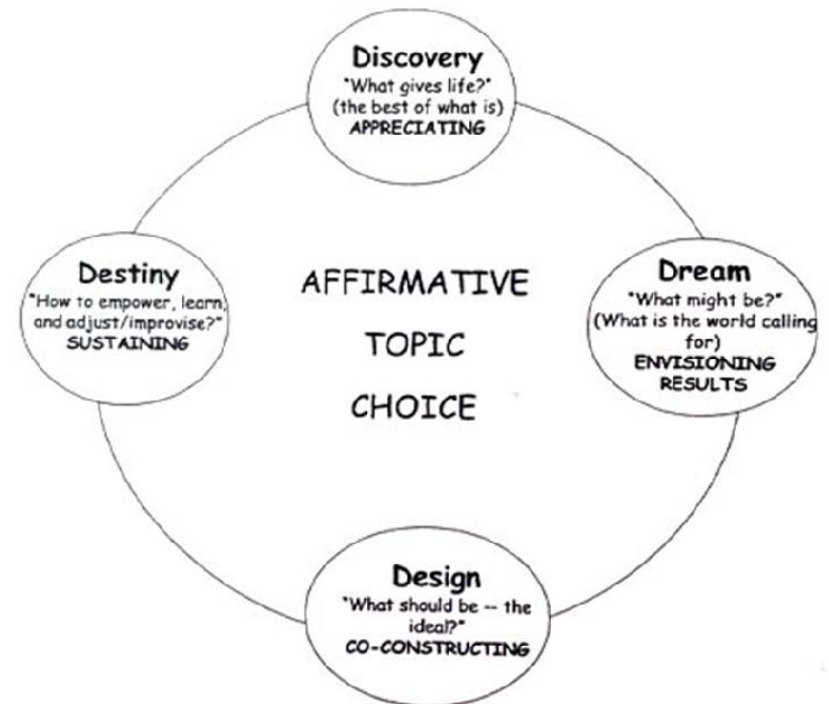
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## CHANNELS OF COMMUNICATION

### Guidelines<sup>16</sup>

1. Face-to-face looking without words
2. Sounds
3. Pictographs
4. Writing
5. Mail
6. Telegraph
7. Phone
8. Radio
9. Fax
10. Email
11. Video conferencing
12. Cell phone
13. Texts
14. WebEx
15. Facetime
16. Real-time "smart glasses"
17. Surveillance

## PHASES OF APPRECIATIVE INQUIRY



Appreciative Inquiry "4-D" Cycle

The method of asking questions to distill knowledge is based on David Cooperrider's work of Appreciative Inquiry.

- Central premise: Human action is dependent on the world as constructed (to-be) rather than the world as it is (as-is)
- Negation, criticism and spiraling diagnosis is replaced with discovery, dream, design and destiny.

## Patrick Lencioni: Five Dysfunctions Of A Team

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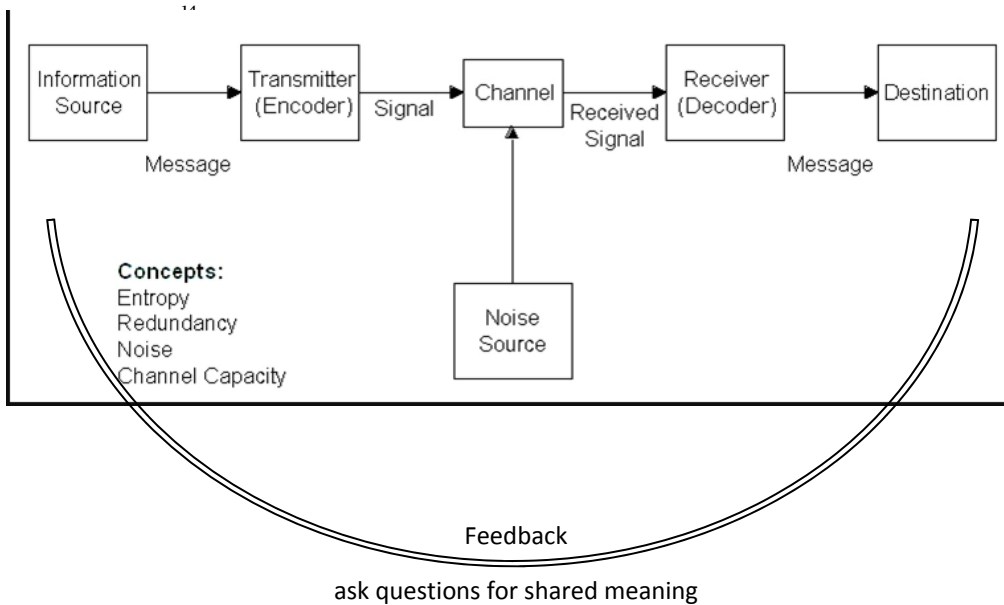


This is the conceptual framework within which knowledge was captured and organized.

## ENCODING/DECODING COMMUNICATIONS

### Guidelines

1. Accent'
2. Colloquialisms
3. Tone
4. Facial expressions
5. Background and culture (100 different head nods in India)
6. Body language in general
7. Mannerisms
8. Frame of reference
9. Language choice
10. Mental models
11. Problem solving tools
12. Text message shorthand (lol, gr8)
13. Emoji



Shannon-Weaver Model of Communication

## BUILDING TRUST

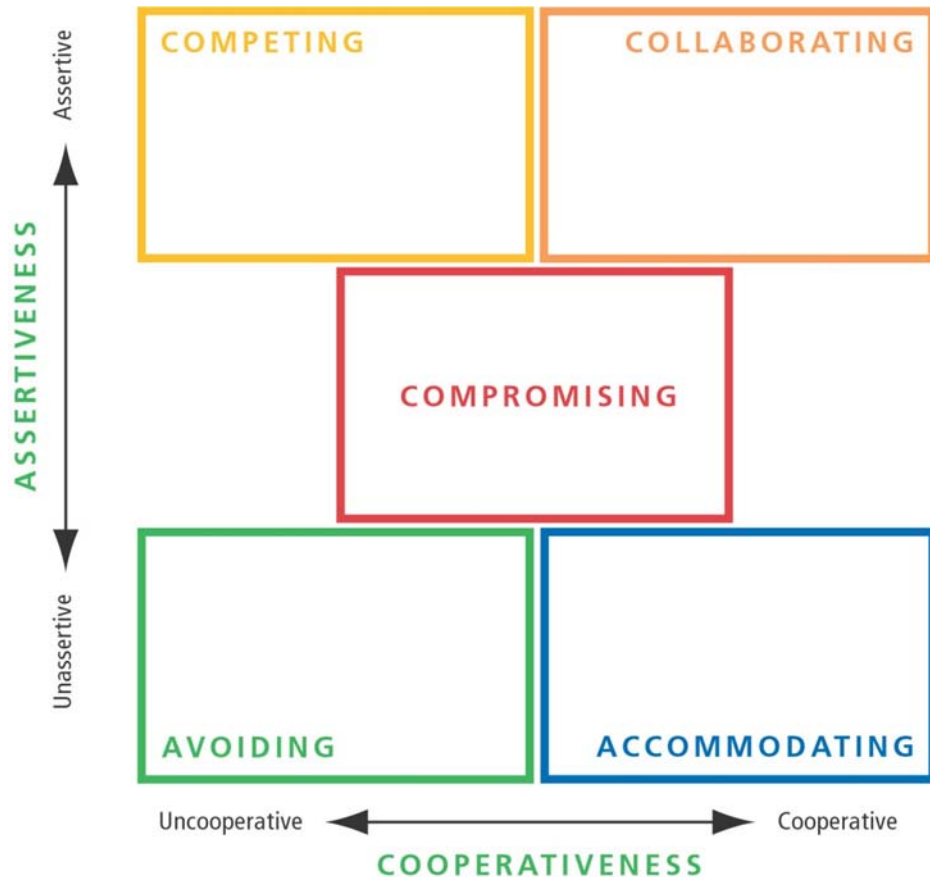
### Guidelines

1. Don't just "jump in and start."
2. Socializing and team building with face-time. Cannot short-circuit this. Team Pasta as an approach to share tasks, share tools, share knowledge.
3. The atmosphere makes a difference to socializing; work vs. bar
4. Co-location facilitates building trust. Challenge: socializing in a virtual world.
5. Agreeing on how we will handle feedback both positive and negative .
6. Admitting when a mistake is made...being vulnerable.
7. Really knowing yourself and your team mates; e.g., when performance is lacking.
8. Demonstrating humility....subjugating ego.
9. Being self-aware , empathetic and fostering a safe and nurturing environment.
10. Apologizing and making an effort to change.

## HEALTHY CONFLICT

Thomas-Kilmann is the conceptual framework used to understanding the modes available for dealing with conflict.

Caution: when most people are high on Avoid and Accommodate, special attention must be given to stimulate healthy conflict where people debate ideas and concepts.





## DELIVERING GROUP RESULTS

### Guidelines

1. Crisp, defined outcomes focus the attention of the group.
2. All activities result in some impact on fiscal goals. Define the fiscal impact of the project.
3. Build unity of the “problem statement” and “defined outcomes” with all key stakeholders in the project.
4. Front-load *effort* to clarify the Project Definition Document with sponsors and champions.
5. Lots of time can be lost defining the problem and outcomes desired; get the “whole system in the room” to facilitate the discussing.
6. Shorter and frequent feedback loops with the customer helps build common understanding and manage expectations.

## HEALTHY CONFLICT

### Guidelines

1. Define and encourage conflict discussions when the group is first formed.
2. Create a set of conflict groundrules.
3. Want you comfortable discussing small, personal inflections; i.e. name left off meeting invitation
4. Mine for conflict with small and frequent “status” check-ins.
5. Find the issues/topics people are passionate about.
6. Make team meetings compelling. Have questions that will force people to take a position.
7. Have an assigned “Devil’s advocate.”
8. Does the group want to play rugby or bocce ball?
9. Use open-forum brainstorming.
10. Develop intensity in the group to energize conflict by remembering the “burning platform” of the project.
11. Recognize and state, “Just because people are silent, doesn’t mean conflict doesn’t exist.” If people are silent, assume disagreement.
12. Scratch the surface to uncover why people are disengaging.

## **COMMITMENT**

### Guidelines

1. In a world of ambiguity, discover data, create action, adapt with new data.
2. Direct questions help draw people out...with silence to encourage answer.
3. Positive attitude of leader coming into the project with desire to discuss.
4. When data is key to the project, understand our tolerance for ambiguity and how much data we need, the sources of the data and the data quality. Be open to change when new data is introduced.
5. Force a public stand on agreement. Unless this pressures a person. When conflict is avoided, poll the group with a ballot.
6. People completing tasks is an indication of commitment.
7. End meetings with clear resolutions and calls to action.

## **ACCEPTING ACCOUNTABILITY**

### Guidelines

1. Double-check with each other on approaches and plans.
2. Break down into sub-groups to encourage accountability.
3. Pulse-checks, check-ins at a personal level...Skype, texts
4. Deadlines drive accountability.
5. Addressing issues immediately in an open way and discuss.
6. Positive attitude when discussing “oops”
7. Understanding the consequences of not accepting accountability.