Enhance the Team Status Meeting

David Saint-Amand, NAVAIR

Abstract. In keeping with the theme of tools and the processes they support, this submission to Open Forum highlights the team status meeting. These meetings help keep a team aware, engaged, and on-track. Their content is used to develop progress and status reports for management. In short, they are a critical tool in support of the project management process. The foundation of these meetings is the agenda which guides, focuses, and bounds the discussion. After years of practice, NAVAIR found that a few small changes to the way the agenda is presented enhanced the effectiveness of their team meetings.

The Traditional Meeting Agenda is a Dull Tool

At NAVAIR, as with other organizations, a typical team meeting probably uses the traditional one-page meeting agenda. This is usually a generalized list of meeting topics distributed either in an email message prior to the meeting, or as a paper handout at the start of the meeting. They are often short and look something like this:

Agenda
1. Call to Order
2. Management Minute
3. Project Status
4. Role Reports (customer interface, quality, etc.)
5. Individual Status ("around the table")
6. Goals and Risks Review
7. Action Items
8. Oh-by-the-ways
9. Adjourn

In practice, the PRT has found that this style of agenda is not very effective. While it may have worked for getting across a broad sense of the status of the project, it did not provide an opportunity for developing a depth of understanding. At best, only one or two people read the agenda prior to the meeting and the rest just glanced at it as the meeting began. As a result, there was usually only cursory preparation for the meeting. Overall project status was delivered either vocally, or by displaying the live version of whatever tool, if any, the team was using to track their project. Individual status reports from the team members were virtually all delivered verbally; and were usually not interesting, memorable, or useful. They tended to devolve into either one or two sentence declarations or rambling descents into minutia, and worst of all; most of the status information was not being captured in written form.

The Presentation-Driven Meeting

After coming to understand the shortcomings of the traditional approach to agendas, the PRT process improvement coaches began to make a series of changes to how their team's meeting agendas were created and presented. It was thought that modifying the process of collecting, displaying, and reviewing the team data would make the team status meetings more effective and less time consuming.

The changes worked, but what the coaches didn't expect was that the changes also made the meetings more interesting and even a little creative; engaging the team members and enhancing the overall status meeting experience. Adopting these changes can help virtually any team enhance their status meetings.

The Framework

What were these changes? They were to transcribe the agenda into a PowerPoint slide deck, give each team member control over their own slides, and place the whole assembly in a team status meeting folder on a network shared-drive that is accessible from both the individual work stations and from the room where the meetings are held (Figure 1). The PRT chose PowerPoint, but any presentation-friendly software should do.
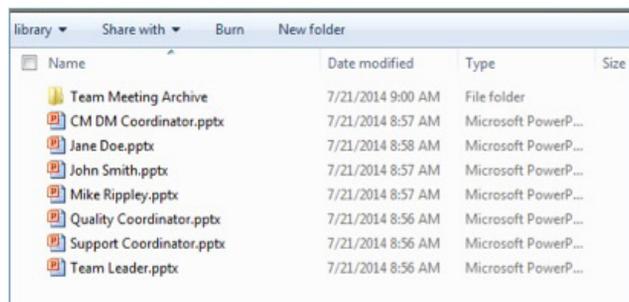

Figure 1: An example of a team meeting folder on a shared drive. The core of this set of presentations is the "Team Leader" presentation.

Being located on a shared drive eliminates many of the issues associated with accessing, updating, and then presenting team status information. While each person having their own status presentation can add up to a lot of files, the advantage is that everyone can update their project status without file-access-interference from other team members. The presentations can be projected for review during the meeting and they can easily be archived by copying the folder for the current week and renaming it accordingly.

The Team Leader's Core Presentation

At the core of the presentation-driven status meeting is the team lead's presentation. It includes the overall agenda, project status, and embedded links to supporting presentations from the team Role Managers and the individual team members (Figure 2).

Figure 2: An example of a team leader's core presentation.
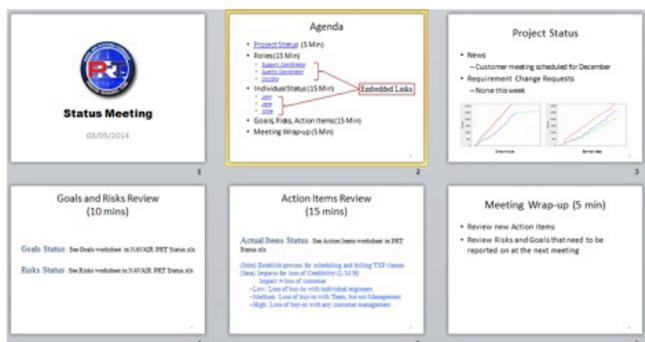
All the necessary status information is covered in a consistent fashion with minimal disruption from moving back and forth between the core and supporting presentations.

The Supporting Presentations

First, the team leader should set expectations for the minimum required content of the supporting presentations and set firm boundaries for propriety. Then they should let the team take ownership.

At NAVAIR, the PRT found that those teams which followed this practice began to tailor the content and format of their presentations. They added and removed information as appropriate, and as they thought interesting. They used different backgrounds, graphics, and in several cases animations to make the material more visually interesting. In this process they became far more cognizant of their data and also more interested in the data being presented by others. Judging from the discussions that the new style of presentation inspired, team members showed overall increase in interest, understanding and retention.

The Team Role Manager Presentation

A team Role Manager, or Role Coordinator, is a team member on a "self-managing" team who takes on some aspect of project management that is typically the purview of middle management: e.g. they track product quality metrics, monitor and report on the progress of the overall plan, or act as the requirements interface with the customer [1]. Prior to the institution of the presentation-driven status meeting, their reports were occasionally printed on handouts, but were more often just spoken, with a brief period afterwards for questions. Now they are concise, focused, and being captured.

The example of a Role Manager's report shown here is taken from a team where the quality measures for the work they were doing were not yet defined, so the Quality Coordinator focused on the quality of the process data being collected (Figure 3).
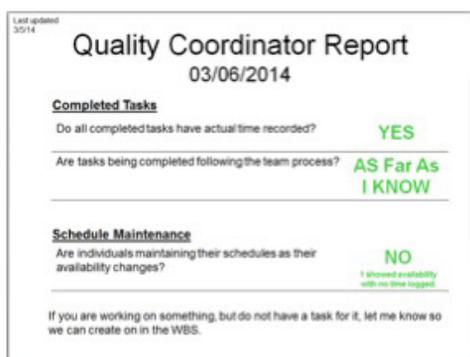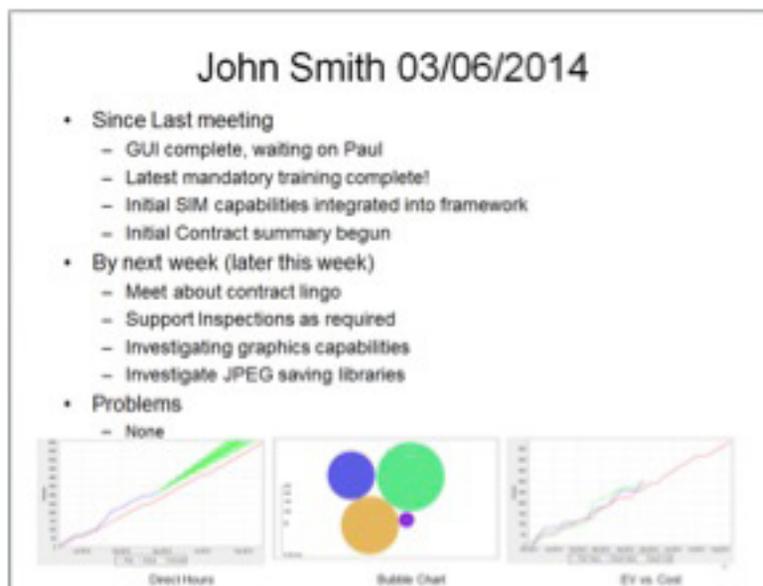

Figure 3: An example of a Role Manager Report presentation.

Figure 4: An example of an Individual Status Report presentation.

The Individual Team Member's Status Presentation

The next example is from an individual on a software development team member (Figure 4). The charts were taken from the process data collection and analysis tool chosen by the team: the Process Dashboard © 1998-2014 Tuma Solutions, LLC.

Using this format, the PRT teams are now getting complete status reports from the individual members. They are reporting their data and explaining it to their team mates. The increased transparency is uncovering issues, improving coordination, and encouraging cooperation.

Final Comments

By changing the way the agenda was presented, the team status meetings of those teams coached by the NAVAIR PRT have evolved into more relevant, easier to understand, and more visually interesting formats; the most innovative of which turned a mundane chore into a pleasant exercise. These meetings have focused information which often includes important details that might have escaped notice if the format had been rigidly controlled. Information is now presented in a manner where meeting attendees can inspect it, ask probing questions, and develop a more thorough understanding of the situation: both of the overall project, and of the status of their team mates. Even better, a complete and detailed project status can be easily captured and archived. By adopting a similar approach, any team can enhance their team status meeting.

ABOUT THE AUTHOR

David Saint-Amand is a process improvement coach with the Process Resource Team of the Naval Air Systems Command (NAVAIR). His previous positions include DCS Corporation Section Manager, Naval Operations Research Analyst, Engineering Geologist, and Seismic Safety Consultant.

He holds a B.A. in Geology from the University of California at Santa Barbara with a secondary emphasis in Computer Science. He is a Defense Acquisition University Certified Level III Life Cycle Logistician, a Software Engineering Institute (SEI) Certified Personal Software Process (PSP) Developer, an SEI-Authorized PSP Instructor, and a NAVAIR Internal Team Software Process Coach.

Mail Stop 6308, 1900 N. Knox Rd.
China Lake, California 93555-6106
Phone: 760-939-2372
Fax: 760-939-0150
E-mail: David.Saint-Amand@navy.mil

REFERENCES

1. Humphrey, Watts S. TSP: Leading a Development Team. Upper Saddle River, N.Y: Pearson Education, Inc., 2006: pp 84-85 and pp 251-275.