

Facilitating an Offline Survey Assessment

11/18/2024 12:29 pm CST

The Offline Survey is a way for a team to assess how they think they meet the criteria for a set of Agile Capabilities, which defines their current progress in their Path to Agility.

Why should I use the Offline Survey?

The Offline Survey has a few benefits.

- It allows the team to spend more time discussing the highest areas of discrepancy between answers
- It allows the voting process to be done ahead of a full-group meeting, reducing meeting time
- It helps to visualize high-level progress for the entire team

It is not meant to replace the need to discuss and reach consensus, but to optimize the time spent together.

Where do I start an Offline Survey?

The Offline Survey requires an unpublished assessment to be created before an Offline Survey can be launched. Once an assessment exists, the Offline Survey can be launched from a variety of places by finding this button:

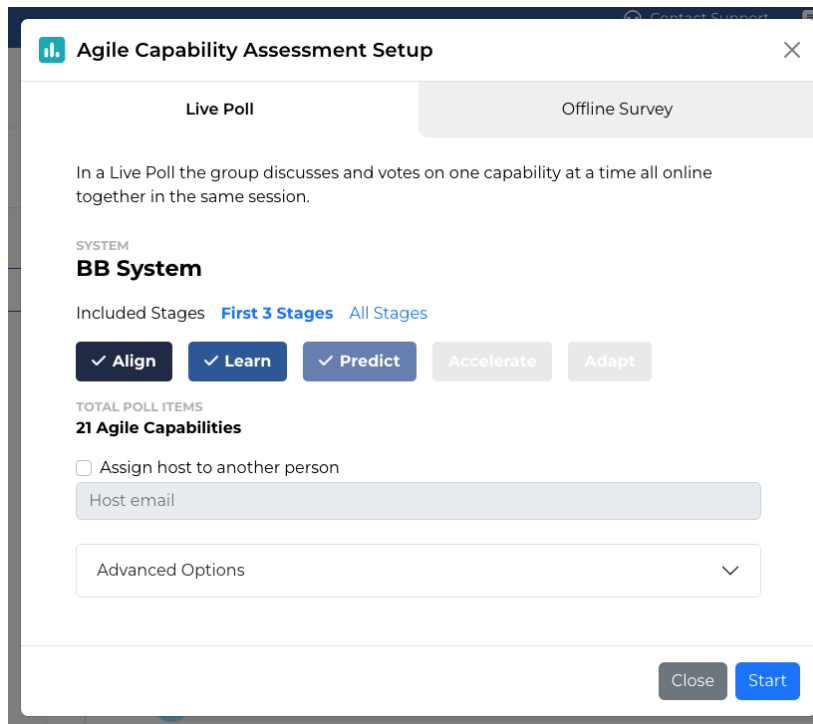


The Assess button can be found on these pages:

- [Dashboard](#)
- [Assessments](#)
- [Capabilities](#)

Make sure to select the correct context before creating the Offline Survey.

Starting an Offline Survey



After clicking the Assess button, you will be presented with this modal, which allows you to choose between the Offline Survey and the [Live Poll, which is documented here](#).

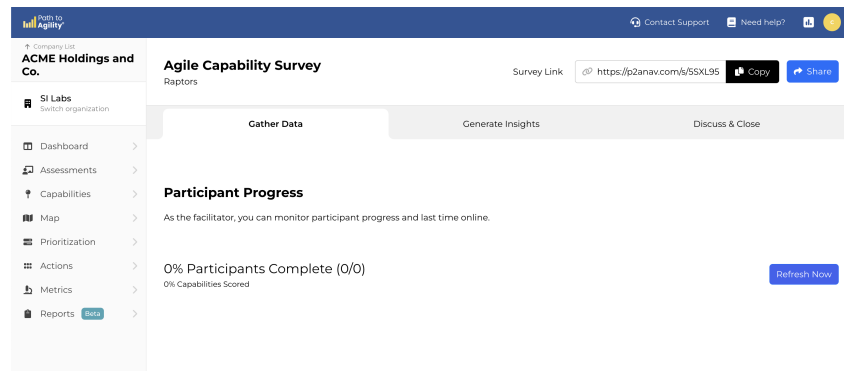
The modal will display the context the Offline Survey is being created for, the included Path to Agility stages, and the total number of Agile Capabilities that will be assessed based on the selected stages. Under the Advanced Options accordion, individual Agile Capabilities can be removed from the set if needed.

For teams that are new to Path to Agility, or are shorter on time, we recommend assessing with the first 3 stages, Align, Learn, and Predict. For more ambitious or experienced teams, all 5 stages can be assessed.

Once you have verified the parameters are correct, click Start to launch the Offline Survey.

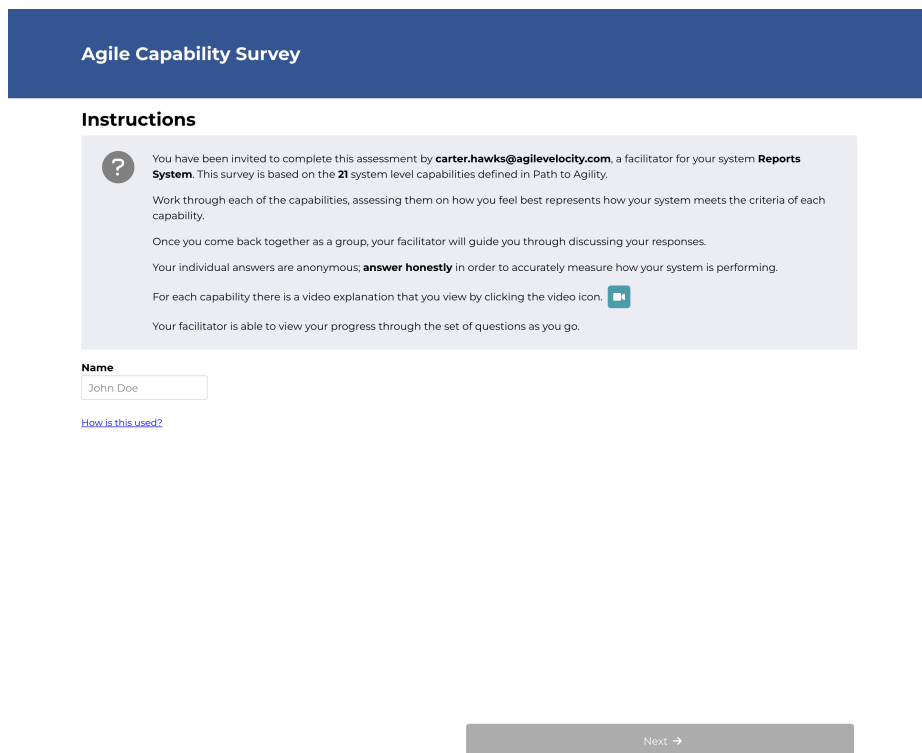
Phase 1: Gather Data

After launching the Offline Survey, the facilitator will be presented with a screen similar to the following.

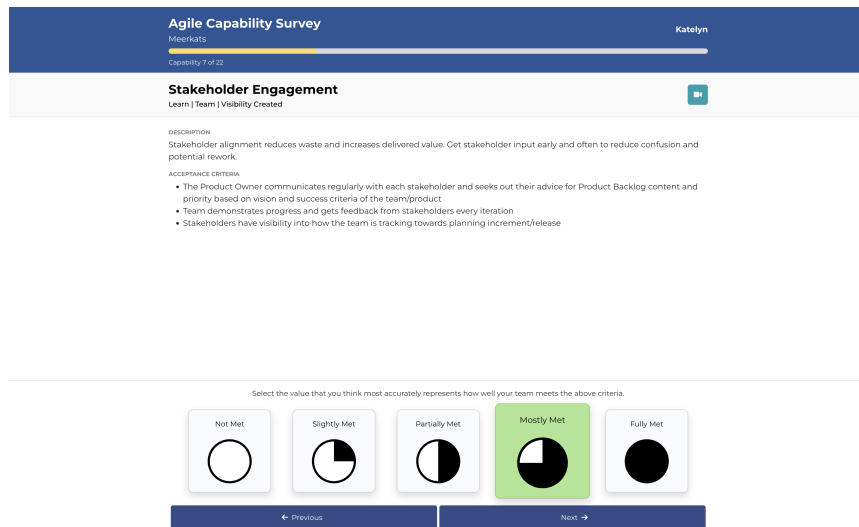


In the top right, the link to join the Offline Survey for participants can be copied, or shared via email. The facilitator should distribute this survey link to their team so they can complete the pre-work portion of the Offline Survey. This can either be done a few days before the planned group session, or at the start of a session. It is intended for each participant to assess the Agile Capabilities individually before coming back together as a group.

When participants visit the provided link, they will encounter a screen like the one shown below. They are given some instructions about the process, and are asked to enter an identifiable name.



Once they've entered a name (and entered the room code if they were not given the room link), they can proceed into assessing the Agile Capabilities.



In this view, participants can view their progress through the Offline Survey, view the Agile Capability information such as the name, Stage, Level, associated Agile Outcome, description, and Acceptance Criteria. They can also click the cyan video icon in order to watch a short video to learn more about the Agile Capability.

Finally, they can select a score that matches how they feel the team meets the criteria, and use the Previous and Next buttons to navigate between each of the Agile Capabilities.

As the Facilitator, you can click the Refresh Now button on the Gather Data tab in order to fetch new data about your participants progress in the Offline Survey.

Participant Progress

As the facilitator, you can monitor participant progress and last time online.

25% Participants Complete
(1/4)
48% Capabilities Scored

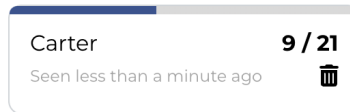
Refresh Now

<p>Andy Seen 7 minutes ago</p> <p>1 / 22</p>	<p>David Seen less than a minute ago</p> <p>11 / 22</p>
<p>Katelyn Seen 7 minutes ago</p> <p>22 / 22</p>	<p>Trent Seen less than a minute ago</p> <p>9 / 22</p>

After clicking Refresh Now, you will see each of your participants, how far they are through the Agile Capabilities in the Offline Survey, and when they were last seen on the survey. The solid blue background indicates that this participant has assessed every Agile Capability in the Offline Survey and is complete. In the above image, the text "25% Participants Complete (1/4)" is describing the number of participants that have fully completed the Offline Survey. The text below it, "48% Capabilities Scored" is describing the percentage of the total number of Agile Capabilities that have been scored across all participants; in this case, it is 43/88 or 48% of the Agile Capabilities are scored.

Deleting Participants

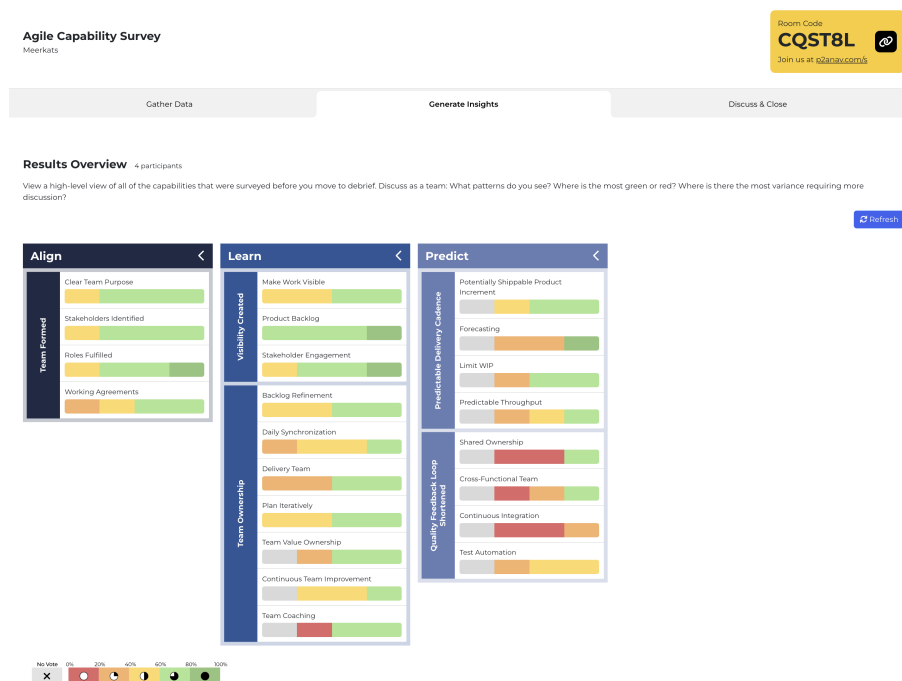
Company admins and assessment admins will also see a trash can icon on each participant. When clicked, this will remove the participant from the Offline Survey, and delete all of the responses that participant had provided from the response pool. This is intended to be used if the same user has participated multiple times on accident, or if a user has joined the wrong survey by accident.



Phase 2: Generate Insights

Once the group has finished individually assessing each Agile Capability in the Offline Survey, the group can come back together to review and discuss how they feel the team meets each Agile Capability. The facilitator should redistribute the Offline Survey room link to participants.

As the facilitator switches to the Generate Insights tab, they will encounter a screen like the following.



Each column is a Path to Agility Stage; in this example, the stages present are Align, Learn, and Predict. Running along the left side of each stage is the Agile Outcomes present in that stage at this context's Path to Agility Level. Within each Agile Outcome, there are a number of Agile Capabilities that were assessed by the participants. The colored distribution bars are showing the distribution of scores the participants gave to each of the Agile Capabilities. Grey sections represent user responses for unanswered Agile Capabilities.

It can be good for the group to review this visual to understand at a high level where the team stands

across the various Capabilities. If there is a lot of red, orange, or yellow in a specific area, that is likely an area for improvement. If there is a lot of light green or dark green in an area, that is likely an area that the team is doing well in. If there are areas with a large mixture of both, perhaps there is a disagreement amongst the team members about where the team lands in those areas.

Not much time needs to be spent digesting the results visualization, as the next phase will dive deeper into each Agile Capability needing attention, but it is good to see if there are any trends that can be recognized as a group.

Phase 3: Discuss & Close

In the Discuss & Close section, the group dives into each Agile Capability that needs attention, prioritizing ones that have the most score disparity among the participants. As the Facilitator, you will receive a view similar to the following.

Agile Capability Survey
 Metrics CQSTBL

Collect Data Generate Insights **Discuss & Close**

Discuss & Close

Make sure to **re-share the survey link** so that participants can re-rate or re-rate below. The items below are grouped in the following categories:

- Definitely Discuss** - Items without a clear recommended score which should be discussed and re-rated on.
- Potentially Discuss** - Items where there is a clear majority and a recommended value has been made. You can either accept the recommended score or open, discuss and potentially re-rate.
- Confirm Unanimous Scores** - These items were unanimously agreed on. Likely you just need to accept the recommended scores.

Press **Confirm** to confirm the recommended score.
 Press **Open** to open the Capability details panel, see voting results, discuss, and re-rate as needed.
 Once all scores have been finalized you can close the survey.

Definitely Discuss

Capability	Recommended Score
Predictable Throughput	Partially Met
Cross-Functional Team	Partially Met
Roles Fulfilled	Partially Met
Working Agreements	Partially Met
Make Work Visible	Partially Met
Stakeholder Engagement	Partially Met
Backlog Refinement	Partially Met
Daily Synchronization	Partially Met

Potentially Discuss

Capability	Recommended Score
Continuous Team Improvement	Partially Met
Potentially Shippable Product Increment	Mostly Met
Continuous Integration	Partially Met
Test Automation	Partially Met
Clear Team Purpose	Mostly Met
Stakeholders Identified	Mostly Met
Product Backlog	Mostly Met

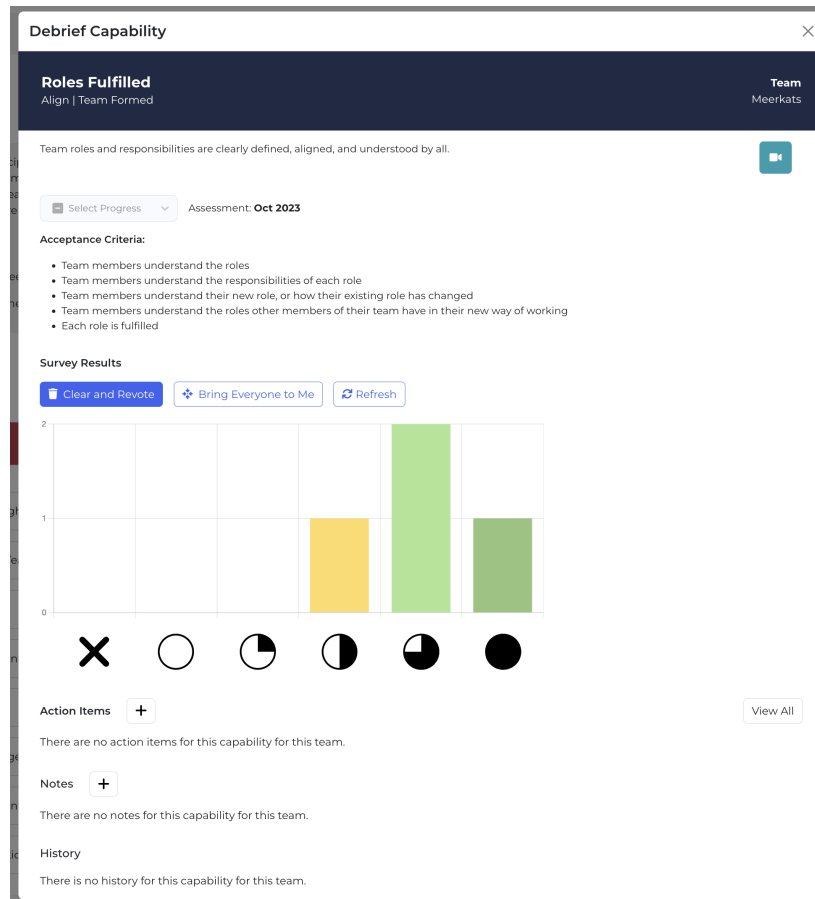
Confirm Unanimous Scores

Capability	Recommended Score
Delivery Team	Mostly Met
Plan Iteratively	Partially Met

Confirmed

Capability	Recommended Score
Team Value Ownership	Team Ownership
Team Coaching	Team Ownership
Forecasting	Predictable Delivery Cadence
Limit WIP	Predictable Delivery Cadence
Shared Ownership	Quality Feedback Loop Shortened

Agile Capabilities are arranged into categories sorted by most disparity to least disparity. Teams should start from the top, with the facilitator clicking into each Agile Capability to bring the focus to it. After participants discuss why they assessed the Agile Capability the way they did, the facilitator can press the Clear and Revote button to allow the participants to reassess. Participants will be able to see their previous score on the screen if one exists.



The participant scores on the graph do not automatically update, and must be updated for the facilitator by pressing Refresh. The Bring Everyone to Me button changes the Agile Capability that the participant is viewing to this one, and prevents them from changing to another Agile Capability.

The sections present on this screen are the same that are present in the [Agile Capability side panel](#), which is expanded on [here](#).

If the group has come to a consensus or near-consensus on the correct assessment of this Agile Capability for their team, the facilitator can select the appropriate score from the dropdown, and close the modal. Once a score is selected in the dropdown, it will move the Agile Capability from the section it was previously in to the Confirmed section.

We highly recommend the team takes the time to go through each of the Agile Capabilities within the Definitely Discuss section. While it is also beneficial to talk about the Agile Capabilities in the Potentially Discuss section, it is not required as usually there is a clear winner in those Agile Capabilities. The facilitator may want to review each of the Agile Capabilities in the Potentially Discuss and Confirm

Scores sections, but they can manually quick-Confirm them if they do not wish to discuss them.

In order for the Agile Capability scores to be saved to the assessment, they must all be confirmed. Once all Agile Capabilities have been confirmed, or if you wish to throw results away, the Capability Survey can be exited and finished by clicking Finalize and Close Survey, located above the Confirmed section.

Not Applicable (N/A)

The facilitator has the ability to mark a capability with the score of "Not Applicable (N/A)"; participants do not see this option in their view. This score option is intended to be used by the facilitator only after a discussion with their team where capability is deemed to be fully not applicable to the team. For example, a marketing team using Path to Agility might struggle to apply a capability such as Test Automation from the outcome Quality Feedback Loop Shortened. It is important for the facilitator/coach to guide the team in applying the terminology of a capability to the specific situation of a team; only use N/A if the capability is truly not applicable.

Closing Words

We recommend each team performs an assessment of themselves through each of the stages at least once every quarter. The Offline Survey can be used as a tool during sprint retrospectives, allowing the team to get a different perspective of ways to improve.

After closing the Offline Survey, the facilitator could take the team through the [Prioritization](#) page to allow the team to choose what their top priority Agile Capabilities to improve are, or perhaps the [Capabilities](#) screen to view all of the finalized Agile Capabilities they just assessed at a high level.
