Facilitating an Asynchronous (Async) Poll

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The Asynchronous (Async) Poll is a way for to assess an organization, system, or team in the platform. Async polls allow participants to submit assessment ratings independently. It's designed to capture input from each participant with a collaborative, joint session where scores are reviewed and finalized as a group. This is valuable for distributed teams where it's difficult to find time for everyone to join a live poll.

Benefits of the Asynchronous Poll

The Async Poll has a few benefits.

- It allows for more time discussing the highest areas of discrepancy between scores
- It allows the voting process to be done ahead of a full-group meeting, reducing meeting time
- It helps to visualize current-state and progress over time

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

Starting a Poll

Polls are conducted as part of an overall assessment. They capture capability scores for a team, system, or organization. To start an asynchronous poll, go to the Assessments page, find the business unit (team, system, or organization) to create the poll for and click the "New" button.

After clicking the "New" button, you will be presented with a modal, which allows you to configure the poll type and capabilities to be assessed (see screenshot below).

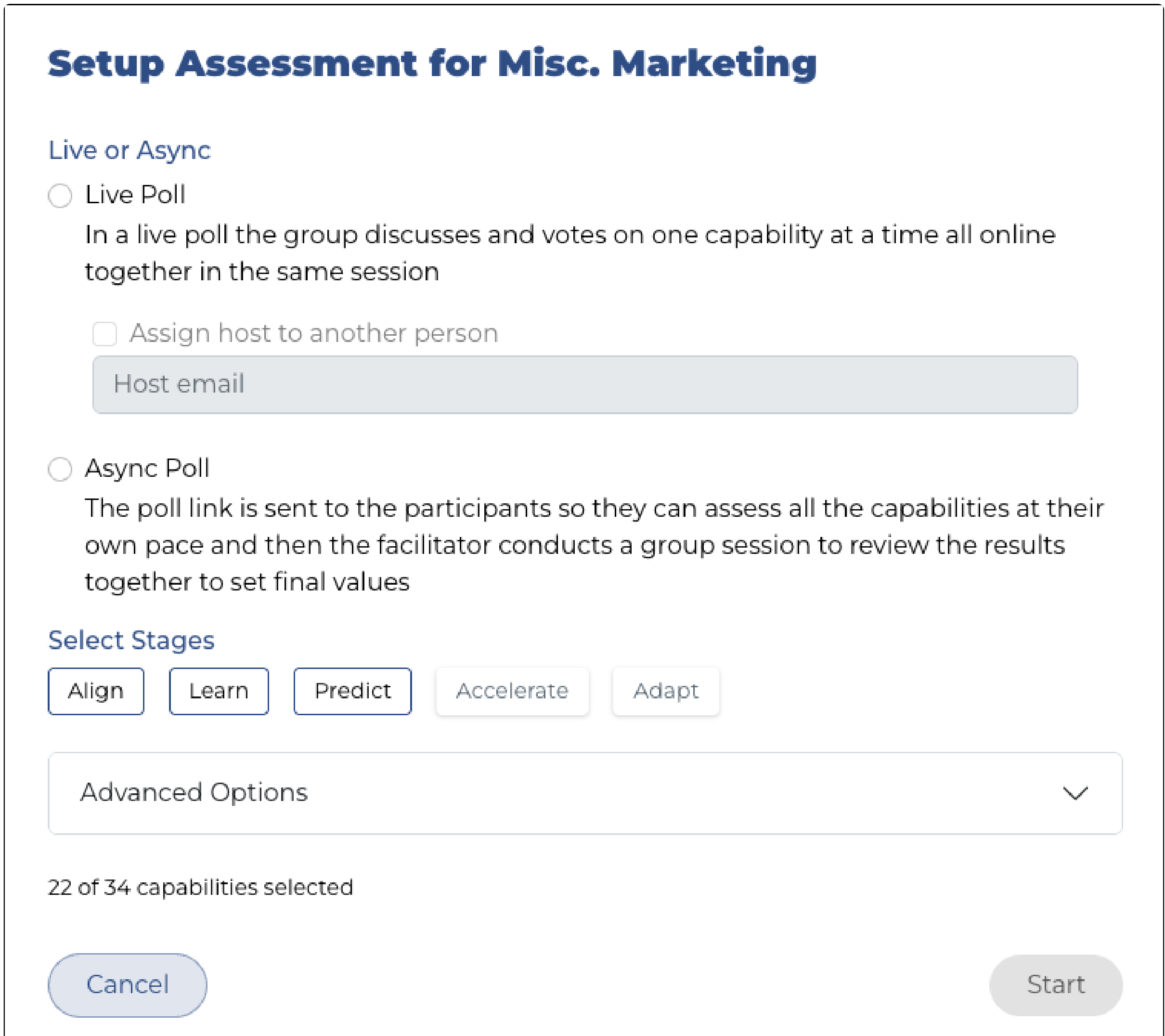


Image. Poll creation modal where poll type (live vs. async) and stages/capabilities to be assessed for a business unit can be configured before starting the poll.

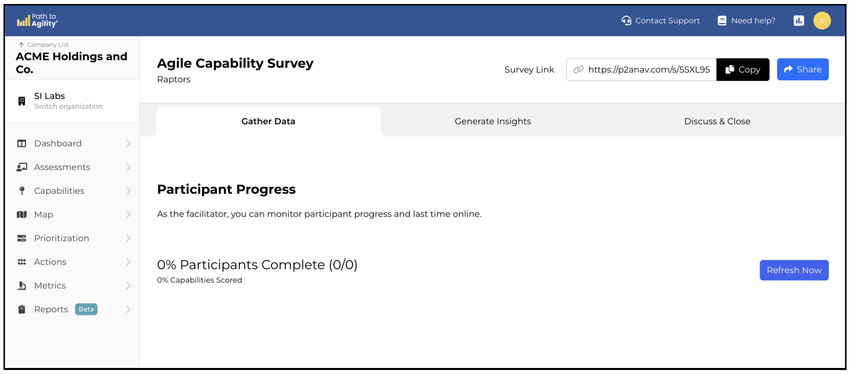
The modal reflects the Path to Agility stages, and the total number of capabilities that will be assessed. Under the Advanced Options, individual capabilities can be added or removed. (To reset the list of capabilities for a stage, click on the stage button and the capabilities for that stage will be reset in the listing.)

We recommend assessing with the first 3 stages, Align, Learn, and Predict until a business unit reaches a level of proficiency in those stages.

Once the poll is setup, clicking Start will create the poll.

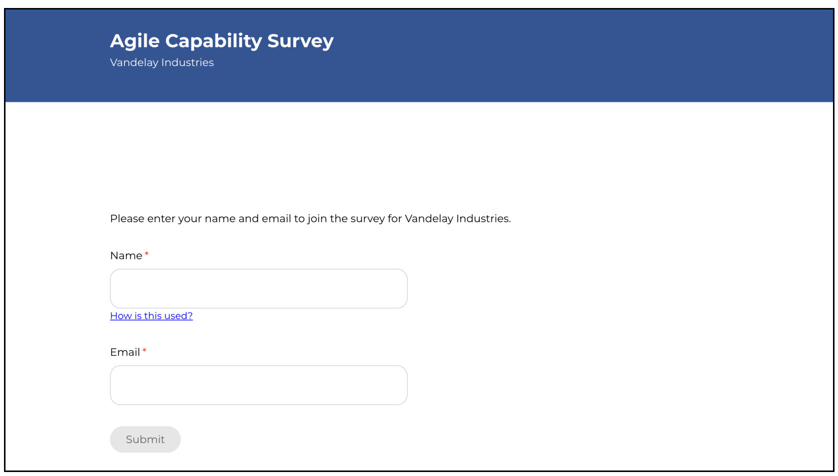
Phase 1: Gather Data

After creating the poll, the facilitator will be presented with a screen similar to the following.

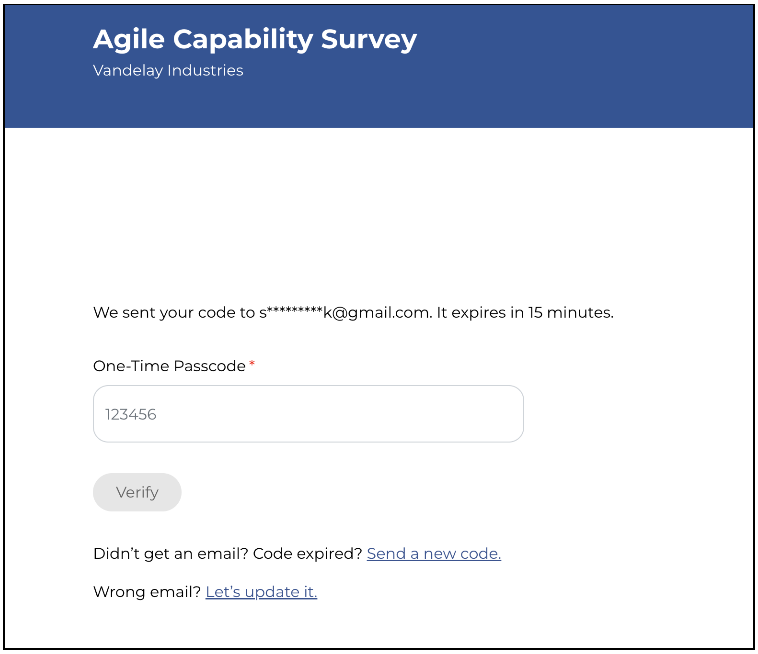


In the top right, the link to invite participants can be copied, or shared via email. The facilitator should distribute the link to their team so they can complete the poll. It is intended for each participant to assess the capabilities individually before coming back together as a group.

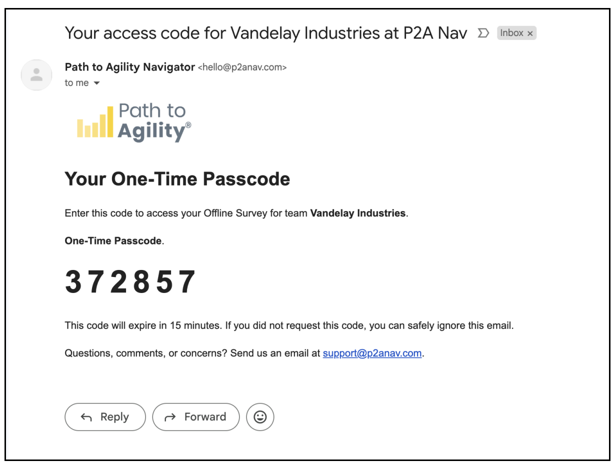
When participants visit the provided link, they will encounter a screen like the one shown below. They are asked to provide an identifiable name and email. This is where the one-time passcode will be sent to move forward.



Once they've entered a name and email, they will proceed to the screen below.



The participant should receive an email from hello@p2anav.com with the following information.



After entering the one-time passcode, they can proceed into assessing the Agile Capabilities. Participants can return to the assessment using the same link that they were previously given without losing their submitted data.

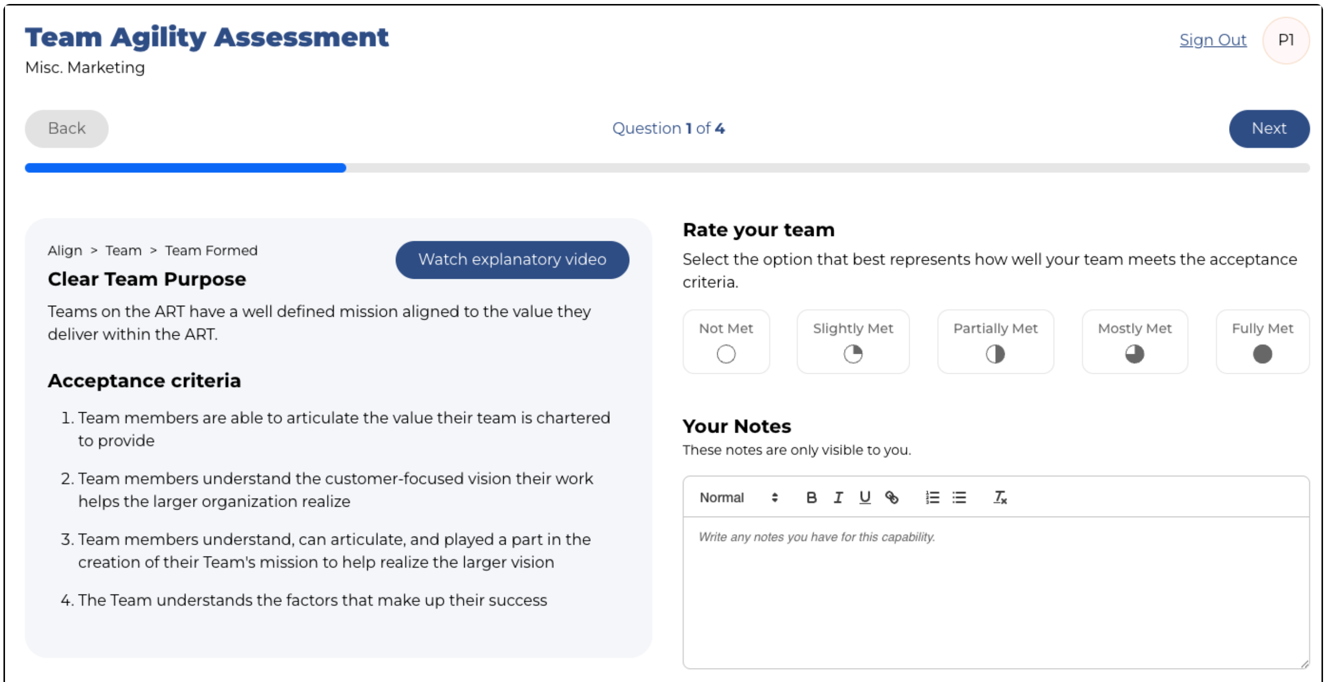
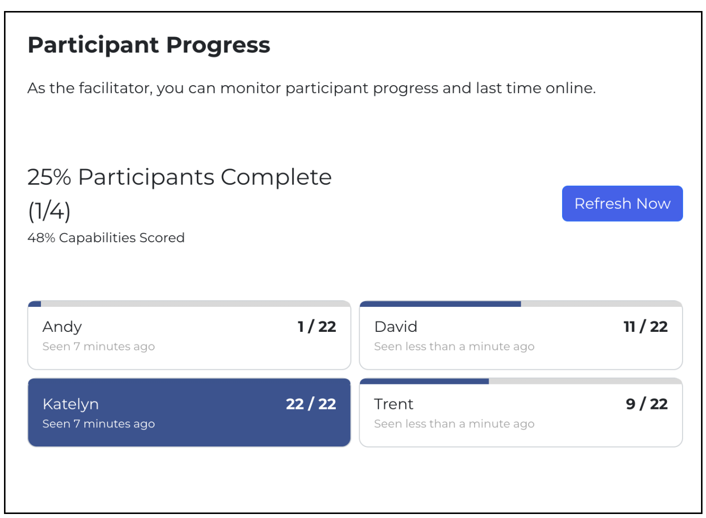


Image. Asynchronous Poll participant view for a team named Misc. Marketing.

In this view, participants can monitor their progress through the poll, view the capability information such as name, stage, level, associated agile outcome, description, and acceptance criteria. They can also watch a short video to learn more about the capability.

Finally, they can select a score that matches how they rate their team by comparing performance to the acceptance criteria. The Next and Back buttons allow navigation between the capabilities.

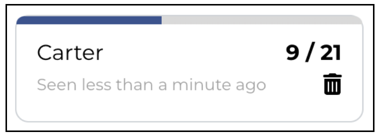
The Facilitator view provides visibility into progress from the participants as shown below.



After clicking Refresh Now, you will see each of your participants, how far they are through the poll, and when they last viewed the poll.

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 poll, and delete all of the responses from that participant. This is helpful if the same user has accidentally participated multiple times, or if a user has joined the wrong poll.



Phase 2: Generate Insights

Once the group has finished individually assessing each capability in the poll, the group can come back together to review and discuss their scores. The facilitator should redistribute the participant link to participants.

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

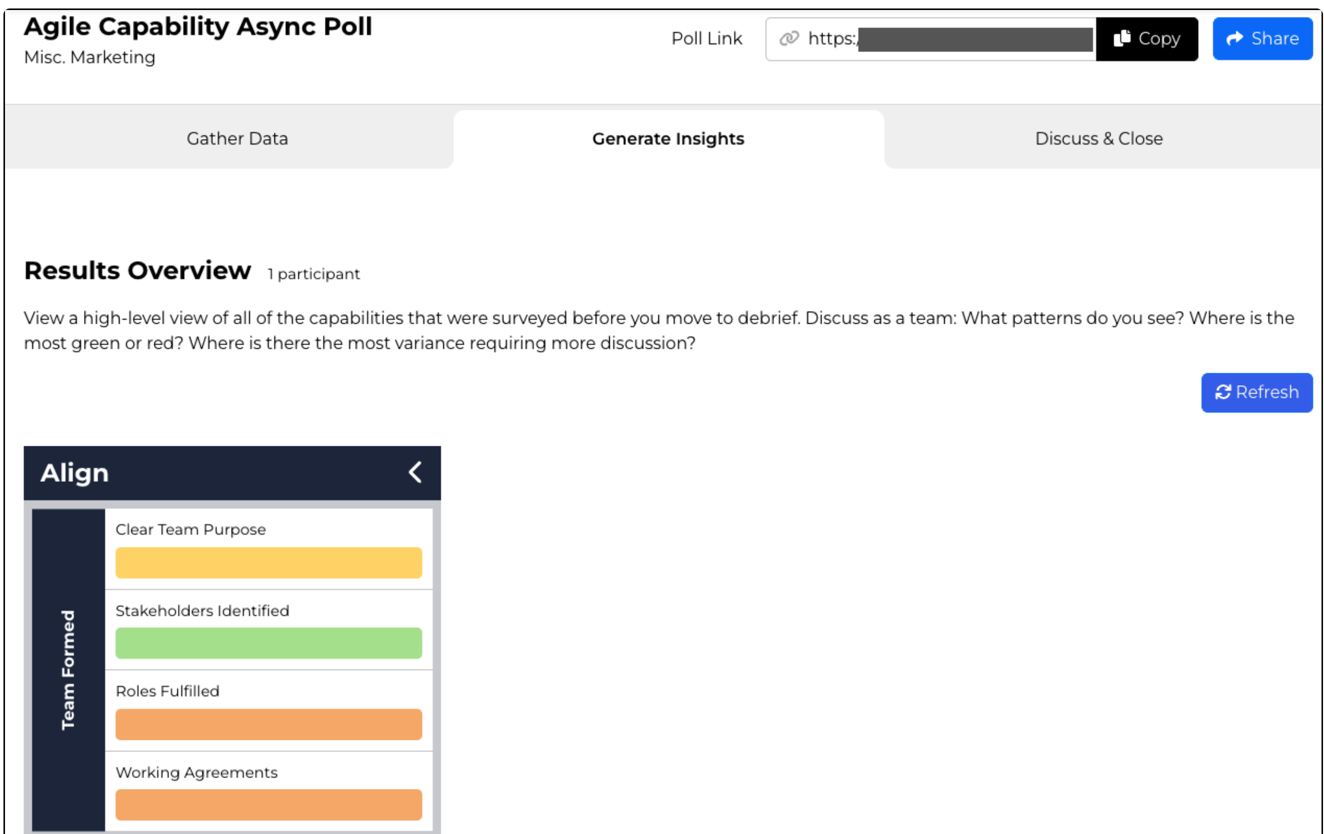


Image. Facilitator view, Generate Insights tab for an asynchronous team-level poll of the Align stage capabilities.

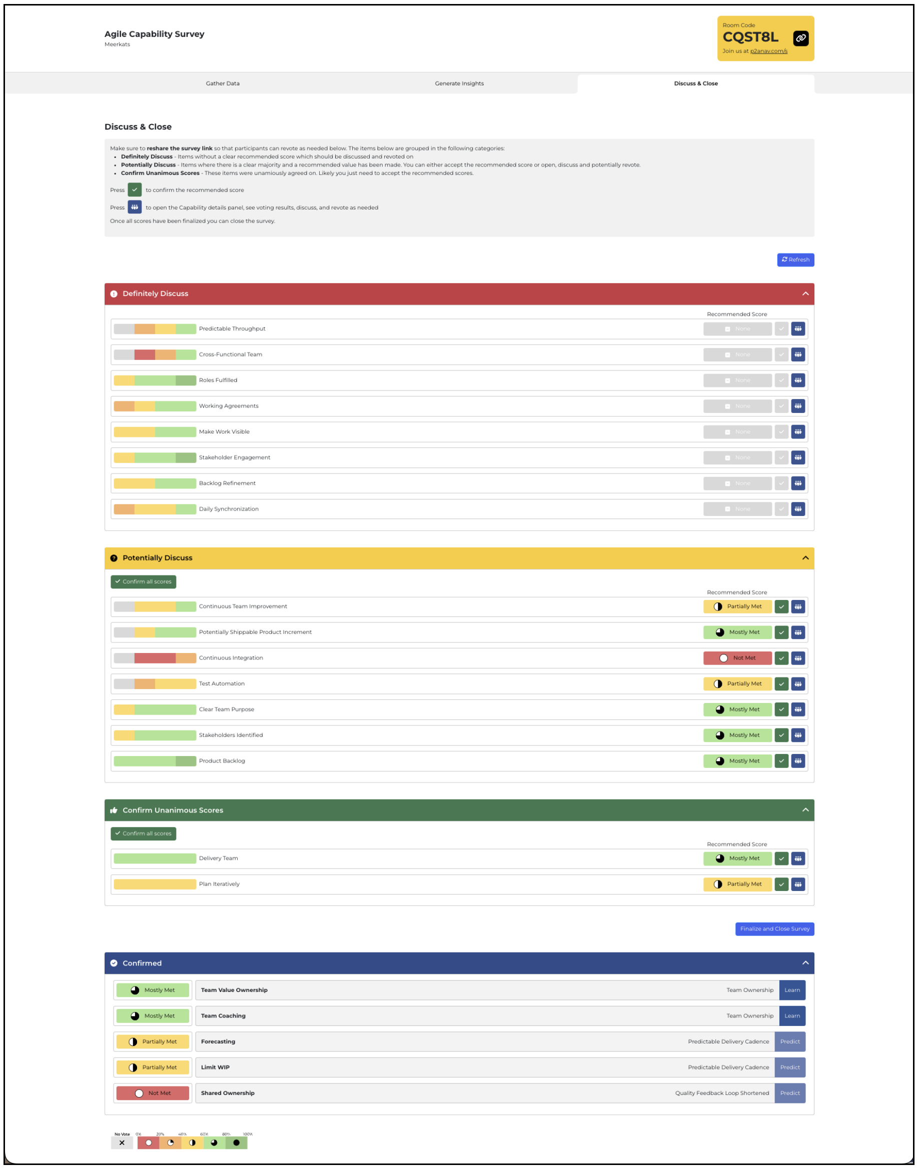
Each column is a Path to Agility Stage; in the screenshot, only the Align stage was included in the poll. On the left side of each stage are the Agile Outcomes for that stage. Each Agile Outcome grouping includes the capabilities associated with that outcome. The colored distribution bars are showing the distribution of scores the participants gave to each of the Agile Capabilities. In this scenario, all participants scored the capabilities the same. Any grey sections indicate a score was not provided.

Reviewing as a group can be helpful so participants see the distribution of scores. 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 of strength. If there are areas with a large mixture of both, it's important to explore further.

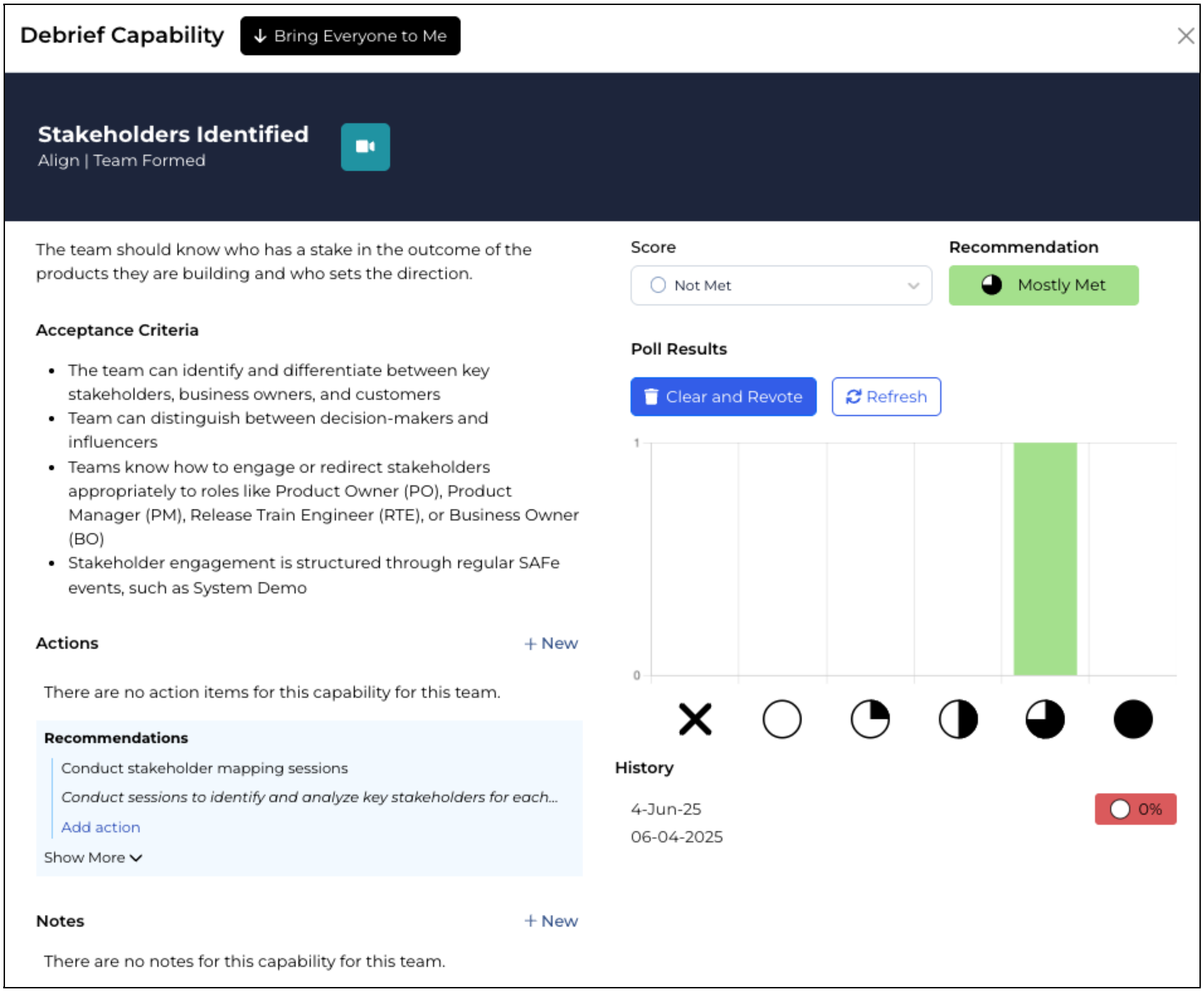
The facilitator has the option to use the Generate Insights tab to start the discussion. By clicking a capability, the debrief screen will open which can be used to discuss and agree on final scores as a group. This view lists the capabilities in order based on stage; whereas, the next tab, Discuss & Close, groups them according to how it's recommended to discuss them (definitely, potentially, or simply confirm).

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 (Definitely Discuss) to the least (Confirm Scores).



Agile Capabilities are arranged into categories sorted by most disparity to least disparity. It's recommended that the conversation start in the Definitely Discuss group. Participants can use the participant link to see how they scored each capability and whether they made any notes (private to each participant) about it. 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 their screen if one exists.



The participant scores on the graph do not automatically update, and must be updated by pressing Refresh. The Bring Everyone to Me button updates the capability participants see in their view.

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 for the capability, the facilitator can select the appropriate score from the drop down, and close the modal. Once a score is selected in the drop down, it will move the capability from the section it was previously in to the Confirmed section.

In order for the capability scores to be saved to the assessment, they must be confirmed (in the Confirmed group). Clicking Finalize and Close Survey, located above the Confirmed section will save the capability scores from the Confirmed section and it will mark the poll completed.

Not Applicable (N/A)

The facilitator has the ability to mark a capability as "Not Applicable (N/A)"; participants do not see this option in their view. This option is for scenarios where the capability truly does not apply to a business unit.