

# 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).

## Setup Assessment for Misc. Marketing

### Live or Async

#### Live Poll

In a live poll the group discusses and votes on one capability at a time all online together in the same session

Assign host to another person

Host email

#### Async Poll

The poll link is sent to the participants so they can assess all the capabilities at their own pace and then the facilitator conducts a group session to review the results together to set final values

### Select Stages

Align

Learn

Predict

Accelerate

Adapt

Advanced Options

22 of 34 capabilities selected

Cancel

Start

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.

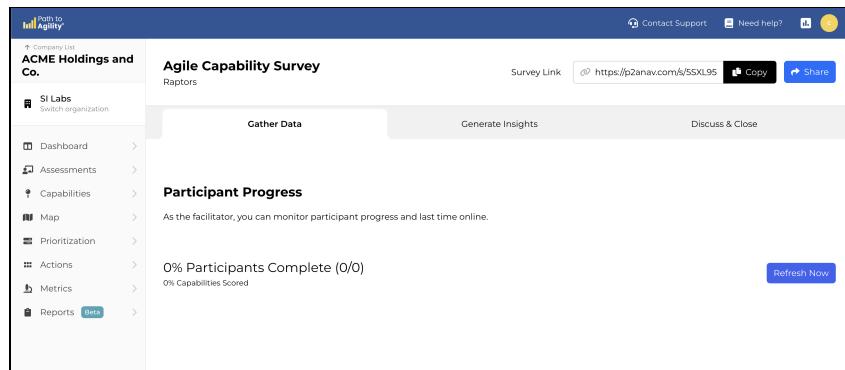
The modal reflects the Path to Agility stages, and the total number of capabilities that will be assessed. Under the Advanced Options, individual capabilities can be added or removed. (To reset the list of capabilities for a stage, click on the stage button and the capabilities for that stage will be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

A registration form titled 'Agile Capability Survey' for 'Vandelay Industries'. The form asks for 'Name\*' and 'Email\*'. Both fields are represented by input text boxes. Below the input fields is a 'Submit' button. A small link 'How is this used?' is located between the two input fields.

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

**Agile Capability Survey**

Vandelay Industries

We sent your code to s\*\*\*\*\*k@gmail.com. It expires in 15 minutes.

One-Time Passcode \*

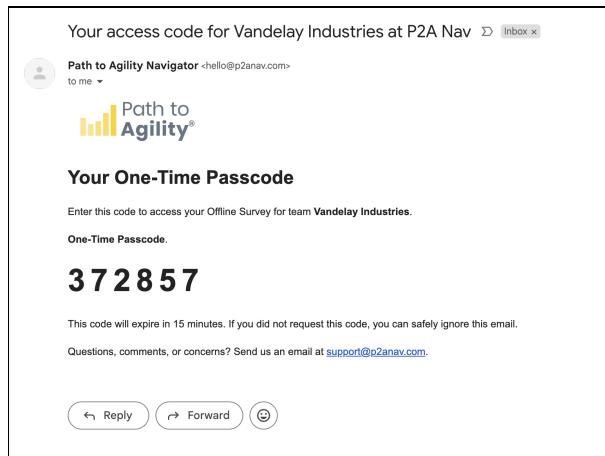
123456

[Verify](#)

Didn't get an email? Code expired? [Send a new code.](#)

Wrong email? [Let's update it.](#)

The participant should receive an email from [hello@p2anav.com](mailto: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.

## Team Agility Assessment

Misc. Marketing

[Sign Out](#)

P1

[Back](#)

Question 1 of 4

[Next](#)

Align > Team > Team Formed

[Watch explanatory video](#)

### Clear Team Purpose

Teams on the ART have a well defined mission aligned to the value they deliver within the ART.

### Acceptance criteria

1. Team members are able to articulate the value their team is chartered to provide
2. Team members understand the customer-focused vision their work helps the larger organization realize
3. Team members understand, can articulate, and played a part in the creation of their Team's mission to help realize the larger vision
4. The Team understands the factors that make up their success

### Rate your team

Select the option that best represents how well your team meets the acceptance criteria.

Not Met

Slightly Met

Partially Met

Mostly Met

Fully Met

### Your Notes

These notes are only visible to you.

Normal

*Write any notes you have for this capability.*

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.

### Participant Progress

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

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

[Refresh Now](#)

Andy  
Seen 7 minutes ago

1 / 22

David  
Seen less than a minute ago

11 / 22

Katelyn  
Seen 7 minutes ago

22 / 22

Trent  
Seen less than a minute ago

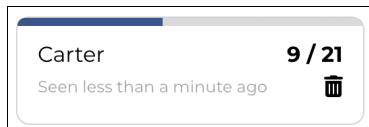
9 / 22

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.

A screenshot of the 'Generate Insights' tab for an asynchronous team-level poll titled 'Agile Capability Async Poll'. The tab is part of a larger interface for 'Misc. Marketing'. At the top, there are buttons for 'Poll Link' (with a URL), 'Copy', and 'Share'. Below these are three buttons: 'Gather Data' (disabled), 'Generate Insights' (highlighted in blue), and 'Discuss & Close'. The 'Generate Insights' section contains a 'Results Overview' for 1 participant, with a note about viewing a high-level view of capabilities and discussing patterns. A 'Refresh' button is available. The main content area shows a 'Align' stage with a 'Team Formed' sidebar. The 'Align' stage has four capabilities: 'Clear Team Purpose' (yellow bar), 'Stakeholders Identified' (green bar), 'Roles Fulfilled' (orange bar), and 'Working Agreements' (orange bar).

**Agile Capability Async Poll**  
Misc. Marketing

Poll Link: <https://...> Copy Share

Gather Data Generate Insights Discuss & Close

**Results Overview** 1 participant

View a high-level view of all of the capabilities that were surveyed before you move to debrief. Discuss as a team: What patterns do you see? Where is the most green or red? Where is there the most variance requiring more discussion?

Refresh

**Align**

**Team Formed**

- Clear Team Purpose
- Stakeholders Identified
- Roles Fulfilled
- Working Agreements

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 Capability Survey  
Meetups

Gather Data      Generate Insights      Discuss & Close

**Discuss & Close**

Make sure to [refresh the survey link](#) so that participants can revote as needed below. The items below are grouped in the following categories:

- Definitely Discuss: Items without a clear recommended score which should be discussed and revoted 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 revote.
- Confirm Unanimous Scores: These items were unanimously agreed on. Likely you just need to accept the recommended scores.

Press to confirm the recommended score  
Press to open the Capability details panel, see voting results, discuss, and revote as needed

Once all scores have been finalized you can close the survey.

**Definitely Discuss**

Recommended Scores

| Capability             | Score   |
|------------------------|---------|
| Predictable Throughput | Not Met |
| Cross-Functional Team  | Not Met |
| Roles Fulfilled        | Not Met |
| Working Agreements     | Not Met |
| Make Work Visible      | Not Met |
| Stakeholder Engagement | Not Met |
| Backlog Refinement     | Not Met |
| Daily Synchronization  | Not Met |

**Potentially Discuss**

Recommended Scores

| Capability                              | Score         |
|---|---------------|
| Continuous Team Improvement             | Partially Met |
| Potentially Shippable Product Increment | Mostly Met    |
| Continuous Integration                  | Not Met       |
| Test Automation                         | Partially Met |
| Clear Team Purpose                      | Mostly Met    |
| Stakeholders Identified                 | Mostly Met    |
| Product Backlog                         | Mostly Met    |

**Confirm Unanimous Scores**

Recommended Scores

| Capability       | Score         |
|------------------|---------------|
| Delivery Team    | Mostly Met    |
| Plan Iteratively | Partially Met |

**Confirmed**

| Score         | Capability           | Notes                           |
|---------------|----------------------|---------------------------------|
| Mostly Met    | Team Value Ownership | Team Ownership                  |
| Mostly Met    | Team Coaching        | Team Ownership                  |
| Partially Met | Forecasting          | Predictable Delivery Cadence    |
| Partially Met | Limit WIP            | Predictable Delivery Cadence    |
| Not Met       | Shared Ownership     | Quality Feedback Loop Shortened |

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.

**Debrief Capability** ↓ Bring Everyone to Me X

**Stakeholders Identified** Align | Team Formed Back

The team should know who has a stake in the outcome of the products they are building and who sets the direction.

**Score** Not Met **Recommendation** Mostly Met

**Acceptance Criteria**

- The team can identify and differentiate between key stakeholders, business owners, and customers
- Team can distinguish between decision-makers and influencers
- Teams know how to engage or redirect stakeholders appropriately to roles like Product Owner (PO), Product Manager (PM), Release Train Engineer (RTE), or Business Owner (BO)
- Stakeholder engagement is structured through regular SAFe events, such as System Demo

**Actions** + New

There are no action items for this capability for this team.

**Recommendations**

- Conduct stakeholder mapping sessions
- Conduct sessions to identify and analyze key stakeholders for each...

[Add action](#) [Show More](#)

**Notes** + New

There are no notes for this capability for this team.

**Poll Results**

Clear and Revote Refresh

**History**

4-Jun-25 06-04-2025 0%

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.

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