Facilitating a Live Agile Capability Assessment Poll

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Overview

The Live Agile Capability Assessment Poll (aka Live Poll) is a way to foster discussion, collaborate, and align on capabilities critical to every business.

Why use a Live Poll?

- It is a platform for a live, open discussion with each participant having an equal voice.
- Facilitators are able to create action items and capture notes in real-time.
- They can be incorporated into retrospectives. "Smart" live polls are designed to take 20 minutes or less.

Smart vs. Manual Live Polls?

Smart Polls

Smart Polls are designed to maximize value and minimize time invested. Navigator uses your organization's prior assessment and prioritization data to decide what to assess and in what order, so you spend more time focusing on capabilities tied to business outcome goals.

Manual Polls

Manual Polls include a fixed set of capabilities to be assessed. The poll includes capabilities that are manually selected either by stage(s) or by handpicking specific capabilities.

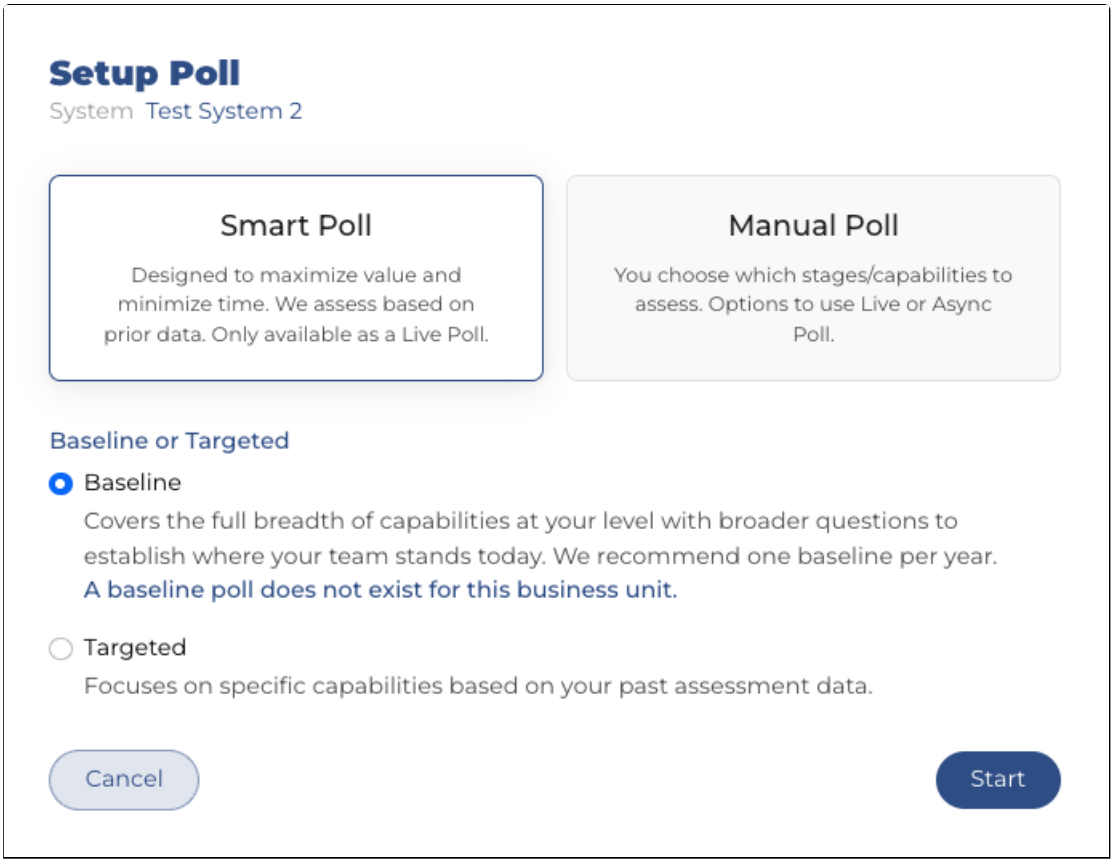
Starting a Live Poll?

First, an active Assessment must exist. Assessments can be created by Assessment Admins. As a reminder, assessments are a container created and published at the organization level. They encapsulate all polls for the organization from the time they're created, until they're published.

Polls can be created for each business unit in an organization from the Assessments page. They can also be managed for each business unit in the business unit view.

When creating a New poll, a modal will open where you can opt for a Smart or Manual Poll.

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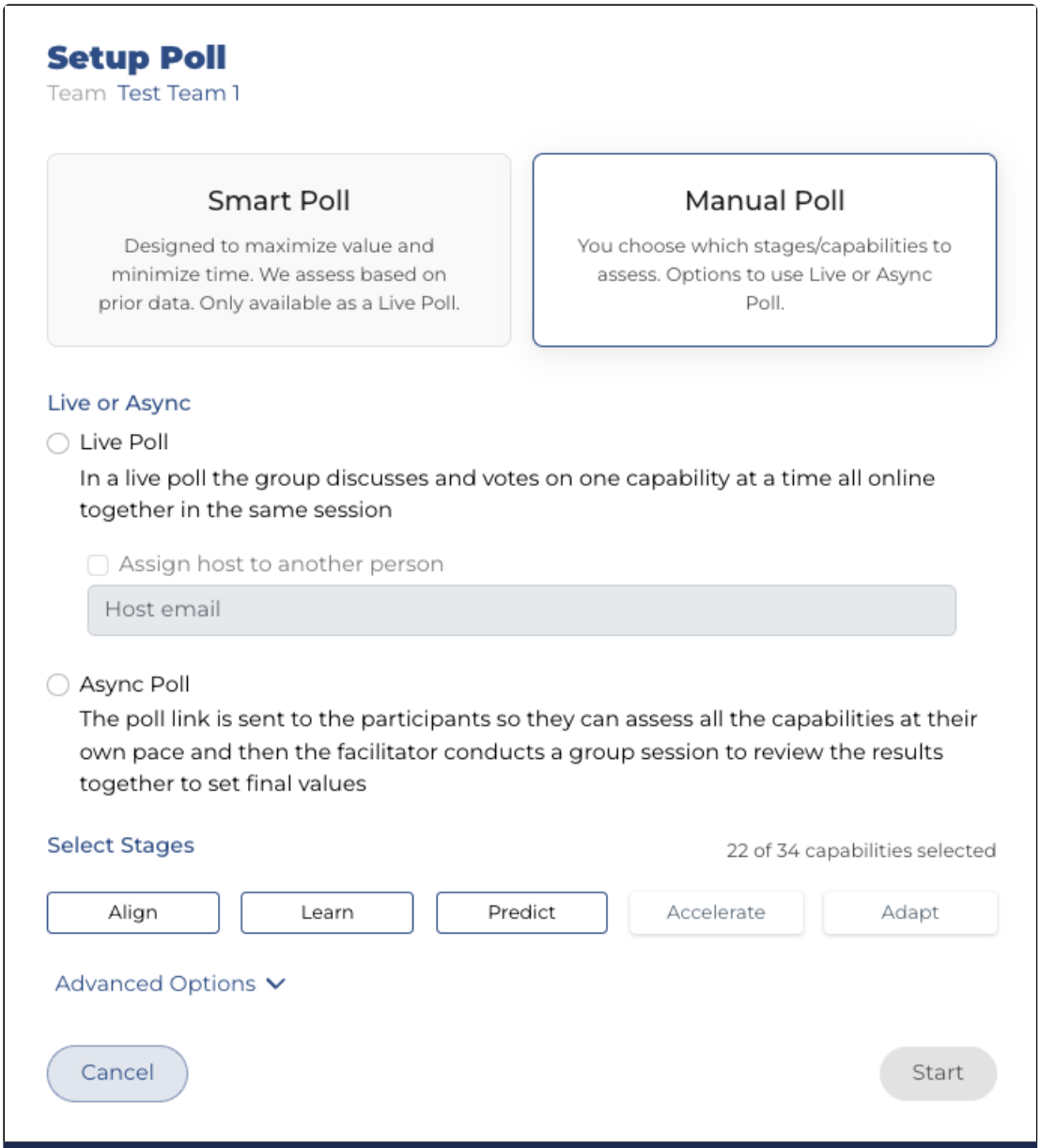
Poll setup window where either a Smart or Manual Poll can be configured and launched.

Smart polls are optimized to focus on the most valuable capabilities based on past data. When you choose Smart Poll, you can run one of two types:

- Baseline - Covers the full breadth of capabilities for the level (organization, system or team) with broader, outcome-level questions to establish where your business unit stands today. We recommend running one baseline per year. The poll setup screen identifies when your business unit last completed a baseline, if one exists. The Baseline poll establishes a baseline of scores for all capabilities. This is the recommended starting point for all business units. If a baseline does not exist, Navigator recommends starting with one.
- Targeted - Focuses on specific capabilities based on your past assessment data. Targeted assessments automatically prioritize recently prioritized capabilities, areas scored below "mostly met," and capabilities that haven't been assessed recently. Targeted is available once your business unit has existing assessment data from a prior poll or assessment. During a Targeted Smart Assessment, the poll adapts as you go. Navigator may finish the poll early, once enough meaningful data has been collected.

Manual polls support creating the poll by either pulling in all capabilities for specific stages or by handpicking them (using the "Advanced Options"). These polls include a fixed number of capabilities and are complete when all the capabilities have been scored or the facilitator clicks "End Poll" to end it early.

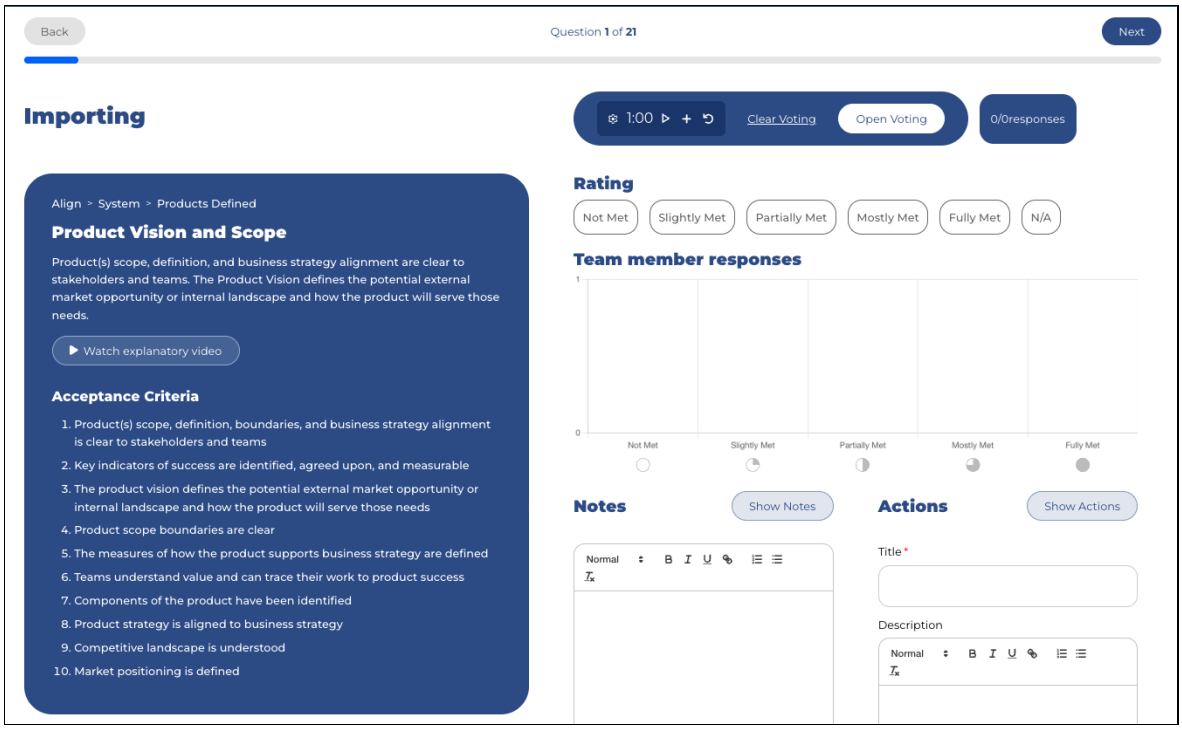
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Manual configuration of a poll.

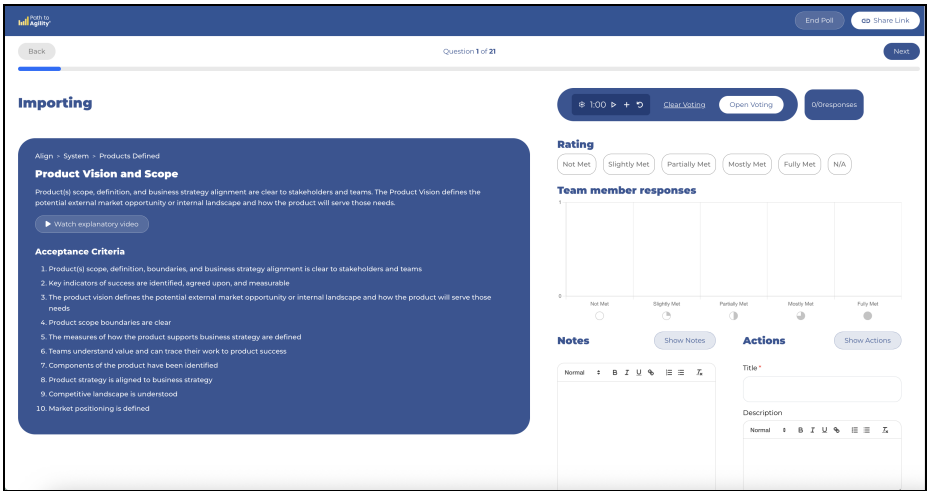
When the poll has been configured (either smart or manual) clicking "start" launches the facilitator screen, which is the control center for the poll. In the upper right hand corner, the "share link" button will allow you to copy a link to share with participants. As participants join, the responses element will update to reflect the number of participants in the poll. An overview of the Facilitator view can be found in the below. Facilitators can add notes, record actions and change the rating from this screen as the discussion happens.

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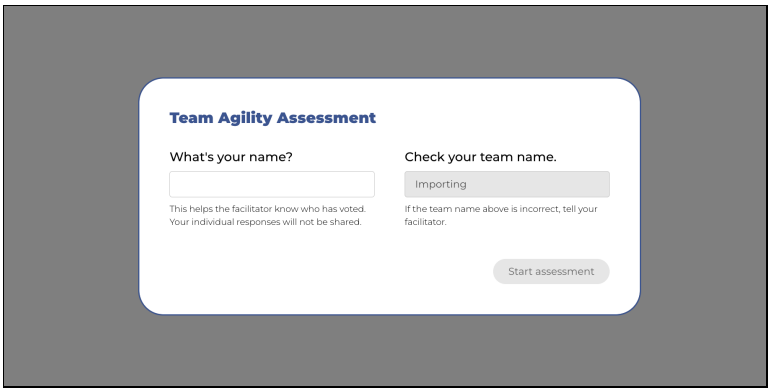
Facilitator View

Facilitators will guide the team through the questions using a screen similar to the one below. Facilitators can take notes from each Capability, as well as assigning actions and marking an over-all consensus vote. Once voting has finalized, the results will be broadcasted on all participant screens to allow for an easier discussion process.



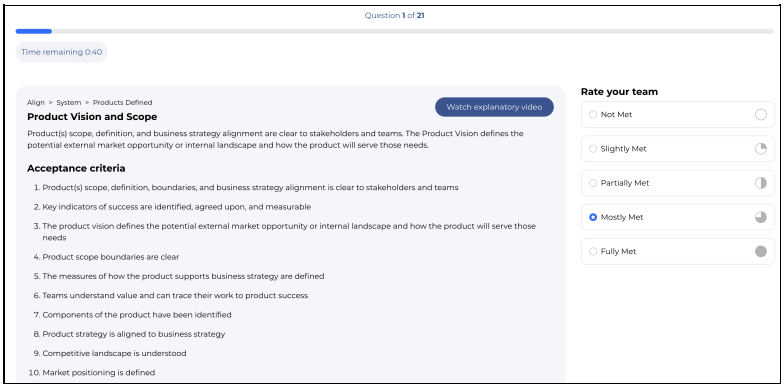
The link in the upper right hand corner will allow team members to vote after entering their names.

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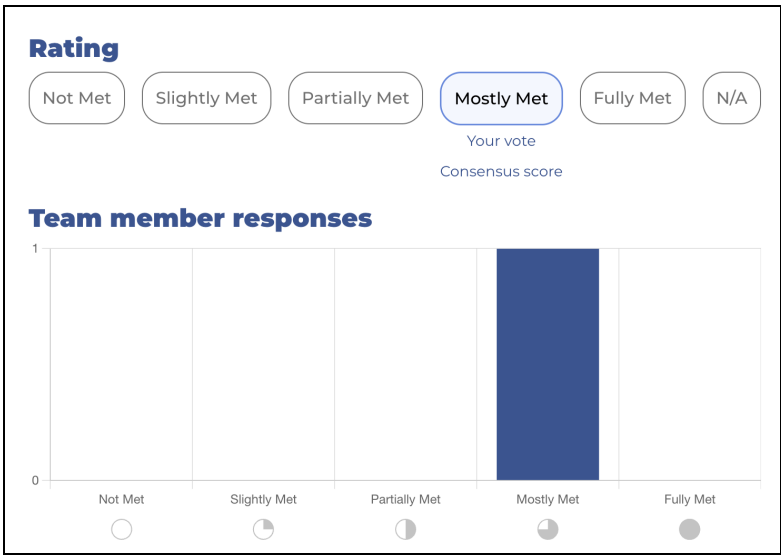


Participant View

Participants will have the below view, with access to explanatory videos, acceptance criteria and definition of the capability that they are voting on.



Once voting has completed and the facilitator turns off the vote, participants will be able to see their own vote as well on the consensus vote on their screen. If the discussion leads to a change in consensus, the facilitator will be able to change the vote and have it represented on the participant screen as well.



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Closing Words

We recommend each team performs a live poll several times a year, though there is no right frequency.

The Live Poll can be used as a tool during sprint retrospectives, allowing the team to get a different perspective of ways to improve. After closing the Live Poll, 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.

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