

Tools-Values Alignment

Tools matter to people. Crafts-women and -men will quit when forced to use the wrong tools. If you're hearing stories like this, it's time to ask: "What do your tools say about your company?" We asked ourselves this question, and this exercise helped us to have an honest, productive discussion about our tools and values.

The Exercise

In this one-hour exercise, you'll find out how the tools you use support the values you share. The exercise is a positive way to bring to light the varying opinions that likely exist in your workplace. You'll discover optimizations you can make that are worth the time, and you may discover gaps in tools (or gaps in values) that you need to address.

Who Participates

Almost every work environment is cross-functional these days. Include people from as many functional areas as possible. For example, if you're a software development agency, you might include:

- a designer
- a project or engagement manager
- a product owner
- a developer
- an office manager

Preparation

To build associations between tools and values, you have to start with a rough list of each (a list of the tools and a list of the values). Your company values should be succinct words or phrases, and they shouldn't be new to the participants. If you've never had a discussion about values, then do that first and then come back to this exercise when you have a set of values you agree on.

Start your list of tools by doing a quick *walking-around survey*. Pick the functions that you want to represent in the exercise, and visit representatives of each function. For each person you visit, ask them to show you the process tools and technical tools they will use that week. (A good intro is to just ask them which tools are on their desktop *right now*.) You might seek to have at least 25 tools (a mix of process tools and technical tools) to start your discussion.

Write the values on a large whiteboard with plenty of space above and below each value. Then write the names of the tools on Post-Its (one name per Post-It). See the Example below.

With the Team

Follow a rough agenda with the team, and let them know how long each part should take in advance so that they are aware of time constraints.

Values Review

5 minutes. Get each person to describe in three sentences what each value means to them. If you hear what you think is an 'outlier' value description, invite a second person to describe it. Keep going with each value until people are roughly agreeing on the statement of each value. (If this goes on beyond five minutes, then it should be done in its own exercise.)

Mapping Tools to Values

15 minutes. Everybody goes to the whiteboard together and starts moving the Post-Its to positions on the whiteboard. Here are the rules:

- Tools that contribute to a Value go *above* the Value. Tools that take away from a Value go *below* the Value.
- If a Post-It for a tool has already been placed above or below a different value from where you would put it, just write a second Post-It with the same tool on it and place it where you think it belongs.
- If there is already a Post-It with the value on it where you would put it, add a single red dot to the Post-It

Putting a tool next to a value doesn't mean that the Tool *has* the Value; rather, it means that *the way you use* the tool promotes (or takes away from) that value.

Discussion

25 minutes. Look for productive discussion starting points, and continue with each until you've exhausted the list. You're looking for stories here about the way people use tools that either support or take away from your values. If you have space, it's helpful to capture the stories on the whiteboard. If not, you can capture them in a separate document as we did.

- **'Hot spots'** with (for example) 2 or more dots on a Post-It. These indicate that three or more people agreed about the tool's association with the Value. Ask the question 'Why does the way we use this tool contribute to this value?' If the association is a negative one, ask the question, 'What are possible alternatives to using this tool?'
- **Competing associations** where, for example, two people have a positive association with a tool and one person perceives a negative association. Ask the question of each respondent, 'How do you use the tool, and how do you perceive it adds to or subtracts from the Value?' Focus on how the tool is being used by the people who have differing positive and negative associations.
- **Tools left without Values.** Tools that don't get posted next to a value can indicate that there are missing values *or* that the tool doesn't support any values. Question: 'What do we need this for?'
- **Values without Tools.** Values that don't have tool associations beg the question, 'Did we leave some tools out that support this?' or 'Do we really value this if we don't support it with our tools?'

- **Values that always go up and down together.** If you have values that always get the same tool associations, you might have two or more values that actually mean the same thing.

These discussion starting points are illustrated in the Example below.

Actions

10 minutes. Actions and Outcomes are up to you! Did you find out something about your tools or values that you'd like to act on? Is it within your power to make the change? If not, can you use the output of this exercise to make the case for change within your organization?

Example Output

We used this exercise internally and with clients, and created an amalgam of our results to illustrate some of the discoveries that are possible.

Setup

The values and the tool Post-Its are set up before the team gets together.

face-to-face

code review

Zeplin

G Calendar

Slack

Jira

standup

face-to-face

G Hangout

FOCUS

first things first

RESPECT

everyone here is good at what they do

EMPIRICISM

test hypotheses

Feature
flipper

retrospective

inVision

G Analytics

demo

G Docs

Trello

inVision

Jenkins

email

Confluence
(wiki)

github

Adobe Sketch

whiteboards

Visual Studio
Code

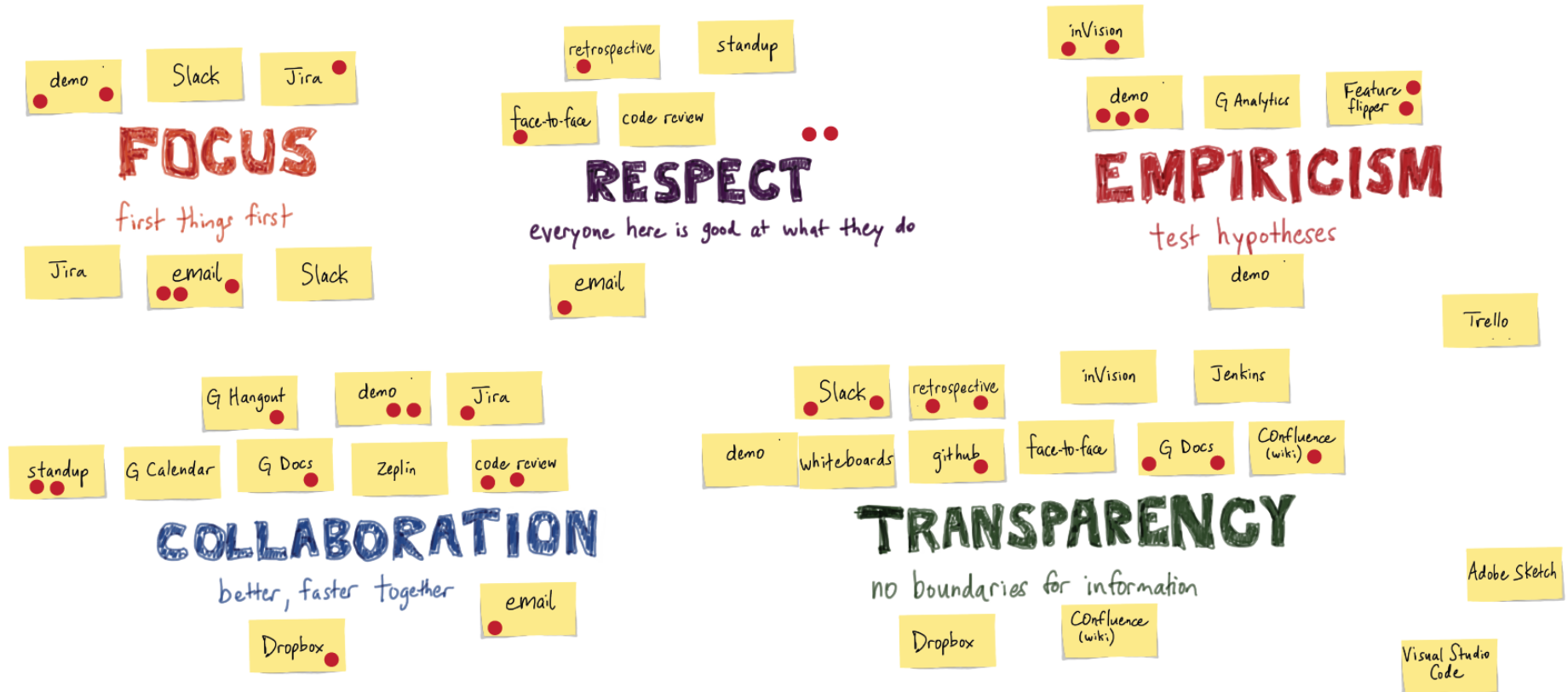
COLLABORATION

better, faster together

TRANSPARENCY

no boundaries for information

After Card Placement and 'Voting'...



Discussion

There is the greatest consensus on two of our process tools. **'Demo' and 'Retrospective' had the highest positive correlations with the largest number of our values.** We agree this is valid signal: these two activities are the most valuable part of the sprint cycle, where we demonstrate working features, enhancements and bugfixes made during the sprint, and talk about what things went right (or wrong) from the sprint. It's the time when we have the best sense whether we are on the right track. Since these activities are so important to us, is there a way to amplify their role in our process? We already designate these activities as 'All Hands on Deck', and we have some pageantry about them--is there is a way to get even more out of them?

Slack has killed email for us, internally, and we have some rules of thumb that help Slack stay valuable:

- searches for shared knowledge are especially fruitful in Slack--just blast into the appropriate channel
- keep your requests short
- don't clog the channel--be sensitive to the value of the group's attention

Tools that we *all* use have the greatest energy around them. **Tools that integrate across functional groups are especially valuable.** For example, Zeplin is great: it facilitates a seamless handoff of design guidance from designers to developers.

We've all tried to use a collaboration tool when nobody else was using it. **We have each used Trello individually, and found that it was a great tool for a single user.** But we haven't used it successfully as a team yet.

Although we're active users of both Dropbox and Google Drive, using both of them on a single project causes documents to get out of sync, become duplicated, or lose their version information. Because we're invested in G Suite, and Google Drive has become a functional superset of Dropbox, we agreed that we can probably save money and confusion by just going exclusively with Google Drive.

We initially missed some key tools that support the value of Empiricism. We had to add Google Analytics, Unbounce and the Feature Flipper to our tools list. We probably missed these because, although Empiricism is a core value, it's challenging to get clients to adopt this value within an engagement. Therefore we don't use these tools as often as we would like.

We didn't write down the process tool 'Estimation Meeting', but if we had we might have identified a missing Value of 'Predictability' or 'Reproducibility'. Likewise, if we had included Harvest (time tracking) on our list we might have identified a missing value like 'Fairness'.

We acknowledge that it's possible for tools to be enablers of bad behavior. When simple, direct communication is replaced with a 'collaboration' tool, collaboration typically suffers. For example, **we agree that we need a tool like Jira** to coordinate our actions and report on progress. But we also need to restore face-to-face communication when Jira is enabling us to avoid each other.

Action Items

Because 'Demo' and 'Retrospective' are such critical activities to us, our to-do's are to **find ways to elevate the visibility of 'demo' and 'retrospective' activities to our stakeholders**. In order to increase stakeholder engagement, we will try circulating comment cards during the activities in order to get even more feedback from stakeholders who may be reticent to participate verbally during the reviews.

We will discuss **getting rid of internal email** just to see what happens.

We will try **using Trello as a team**, with the goal of identifying best practices we need to make Trello useful.

We will **get rid of Dropbox**, in favor of using Google Drive everywhere.

We're going to **expose our Empiricism tools to our clients** at the outset of each engagement.