**Program & Session Leader Guidance**

**Action Week USA July 20th – 24th**

**Introduction:**

Firstly, thank you for agreeing to lead a session at TAW USA to be held in Morristown NJ. This is an important responsibility to ensure all participants have a positive experience and continue to return to future events with a view to maintaining their participation beyond these face to face sessions.

We are on a journey of redesign of our Action Week events. The fundamental essence of this redesign is to ensure that all participants, leaders and their companies gain maximum value of the collective wisdom of those that have chosen to invest a week from their busy schedules at TM Forum Action Week.

At TM Forum Action Week Lisbon we had significant focus on the following areas:

* Ensuring that we are driven by business needs
* Ensuring that we re-evaluate what we are doing against most recent shifts in industry.
* Ensuring we adopt agile principles to drive for more rapid delivery of best practices to industry.

For Action Week USA, we will build on these changes and emphasize the follow focal points:

* Improved on-boarding of new participants
* Improved management of inter – dependencies across projects
* Clear program objectives
  + Overall
  + For the Week of AW
  + Continuous evaluation against objectives
  + Demonstration against objectives
* Clarity on Roles & Responsibilities
  + Clear consumer representation
  + Clear leader & facilitator
  + Clear on-boarding champion
  + Clear mentor & sponsor
  + etc

As a session lead, along with representing your company you are also in a leadership position representing TM Forum collaboration. It is important that you embrace the new design and feel comfortable to hedge off any concerns raised by other members. If you have any concerns regarding the redesign of the event, please contact me directly, jobrien@tmforum.org

**Leading your session:**

Where you have a significant contribution to make to a session, it is **not** recommended you lead the session. In this situation, it can be difficult to chair the session and ensure that you have the right participation from all potential contributors while also actively contributing.

**It may go without saying, but as Session Lead you need to be able to focus on leading the session.**

In your role as session lead, it is important to recognize your role in selling the value of participation in your team. Keeping your participants highly motivated and interested in your topic over the course of 4 / 5 days and ensuring you gain the maximum value from all participants is the ultimate goal.

Hence, you need to be passionate and focused about your subject area.

When participants agree to participate in your team for the week, request that they wear the badge representing your team. This will facilitate improved networking opportunities for the participants and help when people are representing your team at a different team meeting to recognize the role they are playing.

**Session Leadership:**

At Action Week USA we are advocating a joint leadership between the session leader and a facilitator. A staff or member can cover either role supported by other key roles in the team such as mentor, sponsor, consumer representative and on-boarding champion.

Sponsor

Mentor

Consumer Rep

Onboarding Champion

Subject Matter Expert

Mentor

Sponsor

**Joint Responsibility:**

The joint responsibilities between the session leader and the facilitator include:

* Ensure the Customer/ consumer view is represented in the team
* Approving the weeks Value model, Priorities & Objectives
* Chairing the working sessions
* Agreeing prioritisation and iteration changes
* Preparing and/or rehearsing the daily progress Pitch Backs
* Ensuring the most productivity is achieved during the week
* Ensuring everyone is actively engaged
* Chairing daily team Stand-ups
* Overseeing the ongoing recording (in Confluence) of output
* Team Member trading (through facilitators network)
* Logistics
* Responsible for ongoing Retrospectives (feels the pulse of the group)

The breakout of responsibilities between the session lead and the facilitator is most likely to be dictated by skills and experience and is likely to vary from team to team.

**Roles & Responsibilities:**

One of the first things we ask that you do is to make it clear who is in the room and to clarify roles and responsibilities. There will be a flip chart in your room where the roles that need to be identified are listed. Use this to capture who is playing which role during your session. For example, identify the session leader, facilitator, on-boarding champion, consumer representative and any subject matter experts. List these on the flip chart. Change these as required for different sessions. Revisit this at least once per day. During your morning standup in your team, is a good time to revisit these.

When subject matter experts are in your room, introduce them. They may have been invited by you or the facilitator to your session for a particular reason. State this so that everyone knows why they are in the room. Outline why you have selected them as the subject matter expert, for example a brief bio might include “has worked in architecture for over 20 years, has achieved x and y in recent times”.

This will help the subject matter experts gain the support of the room but recognize that they can be challenged also and debate is healthy.

**Prioritization:**

***“Prioritisation is only guessing without a clear value model”***

Once you have established roles and responsibilities it is important to agree the value of the work being load and agree a prioritisation based on this value mapping.

* What “Value” to the Consumer (customer) is this work?
  + Monetary, brand, time (saving), knowledge.......
* Each product may be different
* Perhaps a combination (weighted value map)
* Value, Prioritisation, Objectives – in this order

This doesn’t need to be extremely detailed, but it is important to agree with the team how the value of the work will be ultimately measured. This is also helpful to align the team on the overall vision / ambitions for the output from the team.

**Know your team:**

Ensure you know all participants in your team and the skills they can contribute to the team. Asking people to introduce themselves is a good way to handle this. Breaks are another good opportunity to delve deeper into this.

Structure your session to gain maximum value of all skills and time available, example, parallel activities, short bursts, re-evaluate productivity, effectiveness etc.

**Onboarding Champion:**

Be sure to get a volunteer for onboarding champion. This is a very important role to ensure that new members engage quickly. It is also an opportunity to build new contacts within the team. Check in with your on-boarding champion at least twice per day on their view regarding the integration of new people into the team.

**Facilitator Focus:**

Core team functions – ongoing and flexible as required

* + Prioritisation of work (from value mapping)
  + Designing parallel work streams
  + Skill mapping ( from expected attendees)
  + Iteration Planning
  + Burn down chart production (progress against plan)

**Observer:**

An observer is someone visiting a project meeting. They do need to have joined a project. If however someone indicates that they wish to observer for a period to decide if they want to join, this is fine. They will be permitted for 1 session.

* Valid role – clearly identified
* Perhaps from another team\*\*
* A staff member learning about this team
* A first timer not sure the best team to align with
* A colleague of a core team member here to shadow them
* If a VISITOR from another team then clearly identify the linkage

If an observer is disrupting the flow of the meeting, you may choose to handle by having a quiet word with this person outlining why the team is focused where they are at this time and why it is important to maintain momentum. If you require a staff person to help with this situation, please contact Joann O’Brien.

**Contributor:**

Every team should have a number of contributors. They may choose not to take additional roles. This is ok. Particularly new people wish to establish themselves as contributors before taking on additional roles.

* Competent contributor
* Has expertise in this task
* Has no other specific responsibility
* Will work in the “best fit” per session

**Chairing a session:**

Ensure as session chair you proactively include people in discussions and activities.

Ensure you are unbiased in your chairing of the session.

Ensure you are respectful of cultural differences. Some cultures require you to invite them into a discussion and are very unlikely to intercept. Be conscious of this and invite quieter participants to provide their opinion.

Ensure you are respectful of people whose first language is not English. Summarizing back conclusions and agreements helps them.

**Iterations:**

Prioritised iterations ensures the most valuable work gets delivered first. Evaluate the duration of the iteration, the size of the team working on an iteration and if parallel teams will work. This is a case by case decision, but the request is that a conscious decision is made regarding iterations to ensure maximum productivity.

* How big (duration)
* How big (team members)
* How parallel (practical integration)

**IPR:**

Monday 11:00am – 12:30pm is an open session. Any attendee can participate in these sessions for teams that are following the structure and flow of the event.

Monday 1:30pm onwards are project sessions. All participants should be joined your project in the online community.

A list of approved participants will be in your room.

People who wish to join a project should go to the IPR desk near reception.

Once a participant has requested to join a project they are permitted into the meeting.

**The IPR statement appropriate for your session based on the IPR mode of your project should be stated at the start of every session. These are placed at the top of each meeting room.**

Experts invited into your session to support an interacting topic should be joined your project to ensure you are working within the IPR policy.

**Contributions:**

Ensure that relevant submitted contributions are reviewed. The deadline for contributions is Jul 15th. Where contributions come in after this date, it is a team decision to accept and include a late contribution. Please ask your team participants if they are ok to accept a late contribution.

Note, it is primarily based on feedback from non-English speakers that the deadline of Jul 15th exists for contributions. Ensure non English speakers in your team are consulted if considering reviewing a late contribution. Only where all participants in your project agree to accept a late contribution, can this be included in the scope of the meeting.

**Interactions across Teams:**

Given the level of interaction across all of the parallel sessions, experts from certain teams will be invited into other teams at pre-defined times.  To ensure appropriate operation under our IPR policy, it is best if these experts will be joined those receiving team projects.  It is best to have pre-identified expert representatives ahead of the event and ensure that they are joined the respective teams that they are being invited to support.

This model replaces most cross functional meetings of the past.  So instead of a full team meeting with another full team, at planned intervals experts will join a project team and provide that expertise into that team.  Representative experts will communicate back to their home team on any agreements made with the other team.

While pre-defined times for experts to join teams is recommended, where a need arises this can also be handled on site in an adhoc fashion. **Please be respectful of other teams needs and ask the session chair if it is ok to request time from a certain expert.**

Example, Monday – Wednesday Frameworx experts are being invited into other teams such as IoT, CEM, Metrics, ZOOM etc. On Thursday the Fx experts will reconvene and ensure all new requirements are gathered and plans for addressing put in place.

**Note, use of expert representatives is much more efficient then full cross team meetings.**

**Note, for all of the sessions listed below, templates will be provided.**

**Important Leader Sessions:**

**Monday:**

Newcomer Session: 8:00am

Intro to new comers. Opportunity to introduce yourself as session lead.

Recommended (not obligated to attend)

Opening Session: 9:00am – 10:30am

3 min stand up from each team.

Topic to be covered:

* Objectives for the week
* Reason for these objectives (industry needs and validation of this direction)
* Any help you need to achieve your goals. (Aka skills/companies required)

**Tuesday:**

9:00am: In project team stand up

This is to ensure that everyone is clear on what they are doing today. Evaluate the progress from yesterday and identify any required changes. Please pay particular attention to engagement. Could productivity have been higher if we had more people actively involved?

Experts who are planned or likely to be invited into other teams for their expertise should also select a home team where they will spend most of their time. They should wear the badge of their home team.

5:00pm – 5:45pm: 3 min stand up for each team.

Questions to be answered:

* Progress against Plan
* Best thing you did today / What stunning revelation
* Value of the work

**Wednesday:**

5:00pm – 5:45pm: 3 min stand up for each team

Questions to be answered:

* Progress against Plan
* Best thing you did today / What stunning revelation
* Value of the work

**Thursday:**

Complete wrap up slides by 12 noon on Jul 23rd. These are required for record purposes and will be made available on Action Week website as record of achievements and next steps.

5:30pm – 6:30pm Final demonstration from each team:

Format for Demonstration: 6 mins per team

Choose most creative presentation to demonstrate how objectives were achieved.

Considerations for final demonstration:

* Achievements v’s Objectives
* How sponsor requirements were addressed
* How consumption requirements were addressed
* Productivity / Effectiveness of teams
* Sharing of key learnings from the week
* Achievement of prototypes
* Next Steps

Followed by drinks reception & Award presentation to winning team.

**Standup Q&A**

Q. Should I as Session Lead provide feedback to other teams?

A. Yes, it is highly encouraged that participants provide constructive feedback to help all teams achieve their objectives

Q. Does the session lead have to cover all stand ups.

A. The session lead needs to ensure that their team is represented in the stand up. If they cannot attend, they should have an appropriate speaker from their team represent the team.

Q. Why should we attend the full event stand ups?

A. During the registration process all attendees were asked which programs they were interested in. Almost all participants registered an interest in most programs/streams. This not only gives all participants the opportunity to stay informed across all programs. It also gives each team the opportunity to gain the value of the full wisdom of all attendees, where additional expertise can be garnered.

These standups are also an opportunity to gain critical feedback, evaluate progress of other teams and gain insights into how best results are being achieved which can subsequently be incorporated into your team.

Note, there is also a competitive element to this event. Voting will take place alongside each of these standups.

Q. What is the value that I as session lead get from these stand ups?

A. It is your opportunity to share the achievements of your team. Note, most participants monitor all programs and feedback to their company. This is an opportunity to promote your work, your own thought leadership and observe hints and tips that could help your team work more effectively.

**Voting:**

At each stand up all participants have the opportunity to vote for the top 2 teams in their opinion.

A leader board will be generated each night and be on display in the general session room.

Participants are reminded of the following considerations when voting for their 2 top teams:

* Productivity & Effectiveness (Is the team achieving what they said they would achieve)
* What team achieved most over the week
* What teams developed prototypes (completed first iteration for their objectives)
* Where customer requirements were taken on board appropriately
* Were end user consumption needs considered

The following people have additional votes which they can give out at their discretion & for demonstration of the behavior stated below. These will be based on observations during sessions as these people will be observing sessions while in session.

Joann O’Brien: Demonstration of embodying the spirit of action week, such as, but not limited to: maximizing value, ensuring all participants are actively and constructively involved in session, maximizing productivity, ensuring sponsor needs are addressed, driving for prototype development, considering end user needs from an ease of consumption perspective.

Alan Bateman: Demonstration of best application of agile best practices.

Nik Willetts: Best application of strategic and business alignment.

**Badges:**

Badges will be available in the meeting room for each of the teams. These serve the purpose of aiding facilitators when running the sessions to know who is visiting from what team at a given point in time.

**Session & Program Lead Checklist:**

* Lead only when you have capacity to focus on chairing the session
* Maintain high energy and motivation in your topic over the 4 days
* Sell the value of participation in your team. When people commit to your team as their home team for the week, ensure that they wear the badge representing your team.
* Ensure you know at all times who is in your room and what skills are available
* Be clear on the roles and responsibilities in your team and capture these on the chart provided in your room.
* Revisit roles and responsibilities each morning during the team stand up.
* When experts from other teams are visiting, introduce them. Explain who they are and why they have been invited into your team and a brief intro from their bio to establish why you have identified them as an expert for your team
* For maximum interaction experts invited to your team session should be joined your project in the online community.
* Ensure sponsors opinions are sought out and leveraged as representatives of end consumers
* Think about how your team output will be consumed. Who are your end consumers and how will they consume your output? How can your team output be made more easily consumable? How can staff help with achieving this level of consumability? (On site, can ask at IPR desk for help with any tooling required to make your output more consumable).
* Evaluate if your room layout is working for you. If it is not, request a change. Requests should go to Janelle Morse before 5pm each day for room layout requirements for the following day.
* Check if all pre-work has been issued to the team
* Check arrange meetings with experts and other teams for the next day
* Evaluate if confluence is working well for you. Do you require additional support? Richard May is on site to support with this.
* If you have any IPR questions, contact Heidi at the IPR desk beside registration.

**Be observant of indicators that things are going astray and take action:**

* Working in big teams with people not engaged
* Disruptive contributors taking the team off focus
* People on laptops doing email etc
* Same person(s) always talking. If only 10% - 15% of your team is doing most of the contributing, then you have a problem!
* Lack of volunteers / ownership
* Lack of an identified consumer

Joann O’Brien and Alan Bateman, are available continuously during the week to help you and your team.

Example of a Sunny Day, what a normal day should look like:

“Normal Typical Day”

* + Daily (or session) Stand-up
  + Check for full team engagement
  + Parallel work streams kick off
  + Facilitator adjusts plans and burn down to reflect stand up agreements
  + Pitch backs as necessary to (ensure integration)
  + Back together for final session
  + Recording of output / demonstration of work produced
  + Pitch-back preparation for main plenary progress session

**Final hint & Tip:**

While the event is structured for maximum value, it is also structured for high interaction, energy & fun! Enjoy the event and remember you can use tea breaks and lunches to lobby people into your team! ☺

I hope you have found this material useful. If you have any questions or comments regarding enhancements please contact Joann O’Brien, [jobrien@tmforum.org](mailto:jobrien@tmforum.org)