

ALIGNMENT

Facilitator's guide

INTRO

No matter how good your plan, how solid your intentions, or even how clear a picture you have of your team, your plan will not survive its first contact with reality. And that's okay. An alignment is designed to address this. It happens somewhere between 4 and 6 weeks into a project and should take between one and two hours. It will leave you with a set of prioritised actions, and a little (or a lot) less anxiety.

If you work in sprints, you can use an alignment as one of your retrospectives, since it fulfils a similar function:

- How are we doing?
- What are we doing well?
- What can we learn from?
- And how are we contributing to continuous improvement?

STEPS IN THIS SESSION

Time estimated:

3-5 participants = 2 hours

5-8 participants = 3 hours

1 Check-In

10 min. The check-in is a chance for the team to fully arrive, physically and mentally. [\(44\)](#)

2 Update Foundation Posters

15 min. This is a chance to talk about what's happened until now and how it compares with what was supposed to have happened. [\(46\)](#)

3 Mapping The Events

30 min. Things will have changed. Plans, even good ones, don't stand on their own, and external and internal factors can derail you. This is a chance to talk about the realities of the project. [\(48\)](#)

4 Start, Stop, Continue

20-30 min. Once you've talked about realities, what will you do about them? This is where you talk about what there should be more of, less of, and none of. [\(50\)](#)

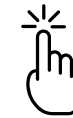
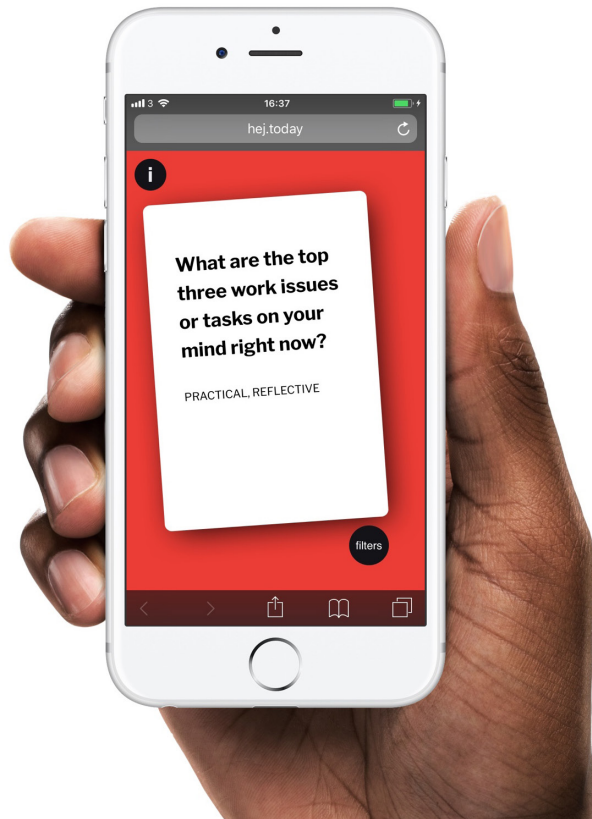
5 Priorities and Actions

20-30 min. If you don't prioritise the items you made above, you'll just get an increasingly long list of tweaks and changes. This is where you turn a potential snag list into a prioritised list of actions that will make everything smoother and the team happier. [\(52\)](#)

6 Feedback

15 min. Don't miss a chance to give and receive some feedback. It helps bond the team and ends the session on a high note. This is optional, but recommended. [\(54\)](#)

1. Check-In



SAY NO TO BULLIES

Some members, especially if they're unhappy or if the team has been stuck in a conflict stage, might express discontent or demonstrate a need to talk more about something that's bothering them. If that's the case, find a quiet moment to plan a time to talk further. Conversely, it can also be a time when bullying tendencies might come out, especially in subtle ways. If you spot blaming or passive-aggressive behaviours, address it immediately. In the group, ask the person to re-frame or rephrase their statement, and if this doesn't work, take it outside the group. For The Teamwork Kit process to work, there can't be any tolerance for bullying, even if it's from a position of unconscious bias or unaddressed power.

2. Update Foundation Posters

 **Time:** 15 min.

 **Material:** A4 papers, colourful pens

This is where you'll revisit the Foundation material and compare and contrast what you set out to do, and what you've actually been doing. You'll decide what to keep doing, where you need to right a wrong turn or meet an unexpected challenge or change, and what you need to start doing as a team or individually. Team members will also get a chance to update any individual goals if they've changed during the course of the project.


If not much has changed, this section will be a hygiene item you can check off in just a few minutes but it could take much longer if there have been a lot of challenges, changes, or updates. About a week before the Alignment takes place, assess the time block you booked for it back when you held your Foundation workshop and consider

if you need to change or add more time. Don't shorten the session, however – if you have extra time, spend longer on feedback.

What to do

- ▶ Put the timeline, goals and deliverables posters, and team posters somewhere people can see them. Team members will arrive with some ideas about what's needed, but you can also give them five or so minutes to look at the material and refresh their memories.
- ▶ Together, use the questions below to guide your discussion, and make sure you use some kind of time-boxing to keep things from derailing too much.
- ▶ Has anything changed in the project since our last meeting, and if so, do we need to update the posters?
- ▶ Are there elements that can be reframed or restated so that they are clear and actionable?
- ▶ Is your team poster up-to-date? How are we each working on individual development goals, and is help needed from the team? Do these goals need to be adjusted?
- ▶ If there's a new team member, help them fill out their Team Template in advance. Show them the materials the team has created so they get an understanding of how theirs should look. Make some space for them to ask questions and ask them supportive questions to ensure they don't feel too lost.
- ▶ If someone has left the team, look together at their Team Template to make sure their duties have been redistributed correctly and make sure everyone's clear who has taken over what.

3. Mapping the Events

 **Time:** 30 min.

 **Material:** A4 papers, colourful pens

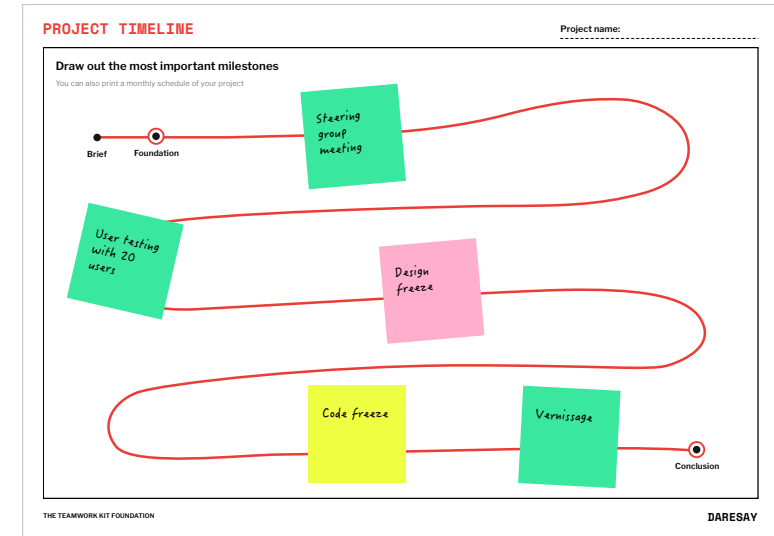
In this part of the session, you'll create a timeline with milestones that stand for key events during the time since the last meeting, as a way to discuss how things have gone so far, and start to make connections between activities, events, and the team's emotional experiences of the project. Then you'll decide what to start doing, stop doing, and continue with.

Timeline Exercise

This is where you'll review the project as it's gone so far, and discuss your experiences of it, to create a way forward that works for everyone and for the project.

What to do

- ▶ Put the timeline on the wall or draw it on a whiteboard/flipchart if you don't have a timeline poster. If you've created it in advance, make sure the group agrees with the representation of events that you've shown.
- ▶ Have each person add events that are individually relevant to them, working solo



Project Timeline poster

with a stack of stickynotes and adding them to the timeline as they go. These can be actual events, such as finally getting in touch with an elusive stakeholder, or moments of importance, such as when the problem finally started to seem clear.

▶ Then have them create an 'emotional curve' of their personal experiences so far, and draw it on the timeline. Use different coloured pens for each participant, and label each line with the person's name.

▶ If the team isn't clear about how to do this, or they have

difficulty opening up about the emotional part, offer your own first, and show a few good examples.

▶ Then, spend 10 minutes sharing and discussing what the team has created. Make sure you time-box this and help the team stay on topic. It may be tempting to start going down rabbit holes, but it's important to prevent that. It might be best for you to go through the stickynotes yourself and ask people for clarifications or details as you go, rather than have each person present their contribution.

4. Start, Stop, Continue



Time: 30 min.

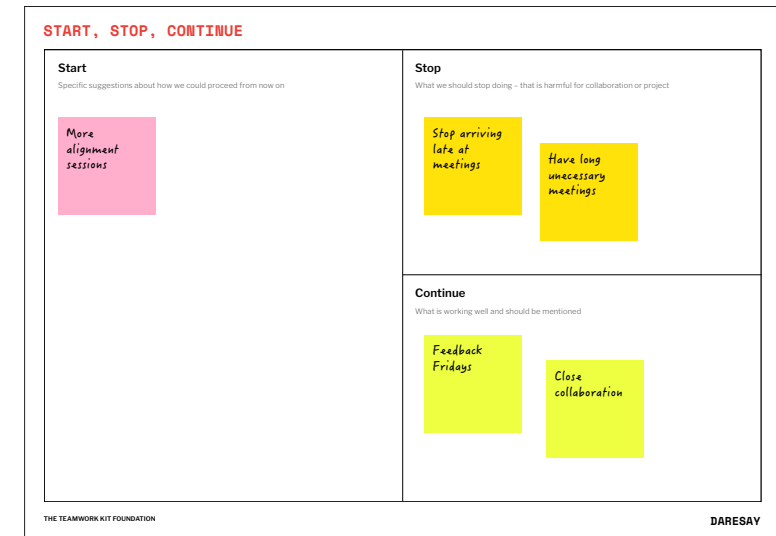


Material: A4 papers, colourful pens

Here's where you'll take a few minutes to translate your activities, challenges, successes and emotional experiences into a way forward. The result will be a list of things that will be a mixture of the practical, such as "We should work harder to start our meetings on time" and the emotional, like, "We should continue paying attention to the value of praise feedback."

What to do

- ▶ Use the template provided or just draw three columns on a whiteboard or flipchart, labelling them "Stop," "Start," and "Continue."
- ▶ Show them some examples, either from the sample poster below, or from a past project within the organisation.
- ▶ Ask team members to write their contributions on stickynotes – as usual, one statement per stickynote – and stick them in the relevant column on the whiteboard. Where there are duplicates, they can feel free to group them as they go.



Start, Stop, Continue Poster

- ▶ Give them 5–10 minutes and ask them to create a maximum of 3 stickynotes in total. It's fine if the 3 notes all belong to the same column. This is to save time and keep their thoughts prioritised.

5. Priorities and Actions

 **Time:** 30 min.  **Material:** A4 papers, colourful pens

Now you'll spend a few minutes going over the contributions and turning them into actions. You may have a few dozen contributions in a large team, so pay special attention to prioritisation, to avoid adding too many new factors. You'll start to notice patterns emerging, so prioritise those and make a list of actions. You may also see a need to realign team responsibilities or shift schedules.

What to do

- ▶ An experienced team might have clustered their contributions as they went along. If they haven't, you can do that now. Cluster them yourself or invite the team to help, giving them a chance to see what others have written.
 - ▶ If there are patterns emerging, team members are likely to agree on what they are, but they may not agree on what should be done about them.
- Take a few minutes to discuss them, and try sticker voting if you need help with priorities.
- ▶ Make a list of things to start doing, stop doing, and continue doing. Teams almost always want more clarity and more feedback, so if you haven't scheduled feedback for the end of this workshop, take a minute to get one into the calendar, or do an impromptu one later in the day, perhaps over a coffee.

6. Feedback (optional)

 **Time:** 15 min.  **Material:** A4 papers, colourful pens

We say this is optional because if you've had a lot of changes in the project, the team might just want to end the meeting and get back to work. It would be wonderful if everyone had the time to give each other positive and constructive feedback, but reality is messy, and you don't want this to feel rushed. But feedback is extremely important in strengthening the bonds between members, and adding it to sessions helps people get into good feedback habits outside of workshops and meetings.

What to do

- ▶ If you have a large group, do feedback in small groups, and try to either divide them arbitrarily, or, if you've had a lot of frustrations, spread the 'cheerleader' personalities across the groups.
 - ▶ Use the templates in the Feedback section, or try your own by asking a specific question, like, "What is one characteristic the other person has that you wish you had more of yourself?"
- Or, "What do you think the other person brings to the project that no one else can?"
- ▶ Let them take a few minutes to think – not everyone can

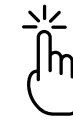
come up with specific feedback on the spot – and write their feedback on stickynotes.

⌂ If the group is relatively experienced together, you can go around and share in the large group.

⌂ If they're fairly new or still not totally comfortable with each other or with Feedback sessions, let them share among themselves.

⌂ Take the most positive stickynotes and hang onto them, so they can be brought out again later. It might even be fun to bring them out at the Conclusion and see if the team can remember who the subject was for each one.

⌂ A more mature group can handle constructive criticism, but critical feedback is easier to take in when there's a relationship of trust. If the team is in a conflict stage, keep things focused on positivity and praise only. You can dial up critical feedback as the group matures, but always make sure there are more positives than negatives.



TIME CRUNCH

If the first section of your alignment was longer than planned, you may feel time is too tight to do a Feedback session. But resist the temptation to cut it out entirely, especially if the team identified a need for more feedback. If you're pressed for time, try an abbreviated session. For example, have team members give structured praise feedback in pairs or groups of 3, publicly or individually.

PRESENTATION

ALIGNMENT

Alignment workshops are a chance to check in about the team's progress and processes, and adjust or re-commit to the plan.

At an Alignment we...

**Review team collaboration
and project details. Identify
challenges and opportunities,
and define future actions**



CHECK IN

AGENDA

1. UPDATE FOUNDATION

Project timeline + Team poster

2. TIMELINE EXERCISE

Map events + My journey + Retrospective

3. PRIORITISE

Actions and responsibilities

4. FEEDBACK EXERCISE (OPTIONAL)

Improve and develop

SESSION RULES



No distractions.



Listen actively, but without interruption. Let people know you're listening and offer validation.



Avoid interrupting or correcting each other. This is a step in building a space safe for sharing.



Be aware of the time for each activity.



Don't try to solve everything. Bring things up, but if there isn't time to cover something, put it in the parking lot.



Findings must be prioritized and result in actions.



1. UPDATE FOUNDATION

Project timeline + Team poster

5-30 MINS

PROJECT TIMELINE

GROUP EXERCISE

Review and update our Foundation poster

THINGS TO CONSIDER

Has anything changed since last time, and does it need updating?

Does anything need to be updated to remain clear and actionable?



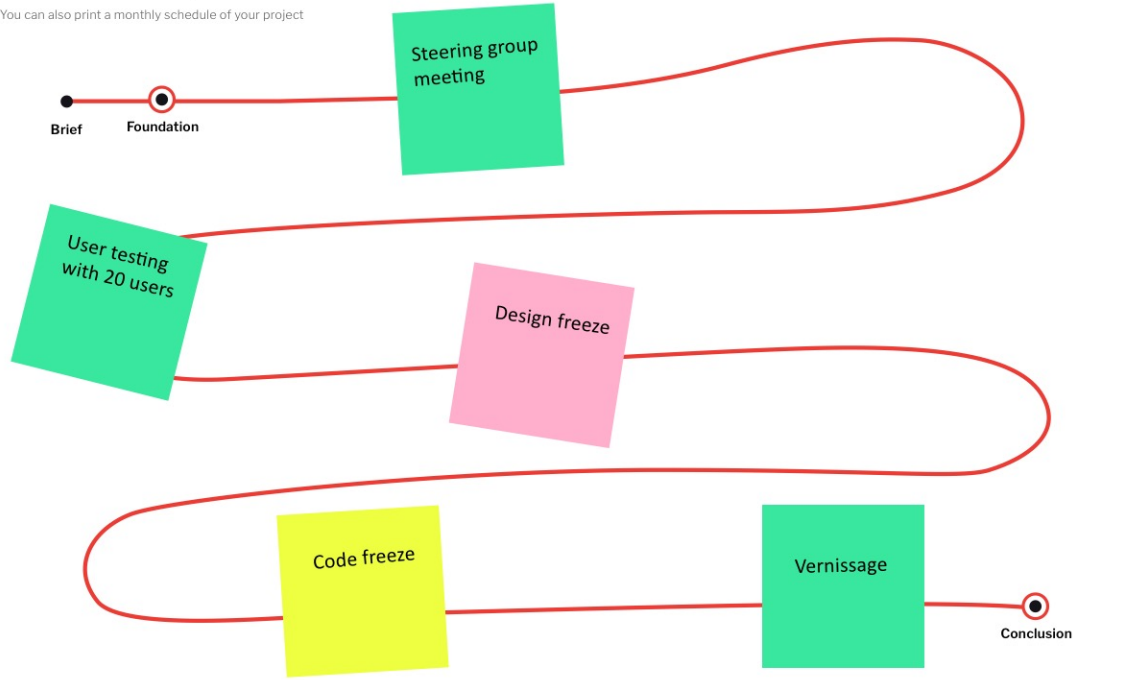
Update Project timeline

PROJECT TIMELINE

Project name: _____

Draw out the most important milestones

You can also print a monthly schedule of your project



Is my team template clear and current?

THINGS TO CONSIDER

How is each team member working on individual development goals?

Do team members have new responsibilities or needs?

Do any goals need to be adjusted or updated?



Update Team Template

TEAM TEMPLATE

My name: Anastasia

My role & project responsibilities

What is the title of your role and what are your primary responsibilities?

- UX Lead
- Use appropriate research methods
- Track design process
- Facilitate workshops
- Align teams

My strengths

What skills do you possess that can be helpful to the team?

- User testing and concept validation
- Making client presentations
- Good at networking



My learning goals are:

What do you hope to learn from this project?

To learn more about front-end development

And I will challenge myself by:

What actions would you take to achieve it?

Executing concepts on Framer

My needs

Work environment, in terms of my role, personal/family etc.

- Separate individual time to work on Framer
- Clear weekly/daily updates
- No meetings before 9:00 and after 15:30 as I have leave to pick up my kid



2. TIMELINE EXERCISE

Map events + do Start, Stop, Continue

30 MINS

Sample Project Timeline



Project
brief

Stakeholder workshop

Steering group
presentation

User testing

Delivery phase 1



APR

MAY

JUNE

JUL

AUG

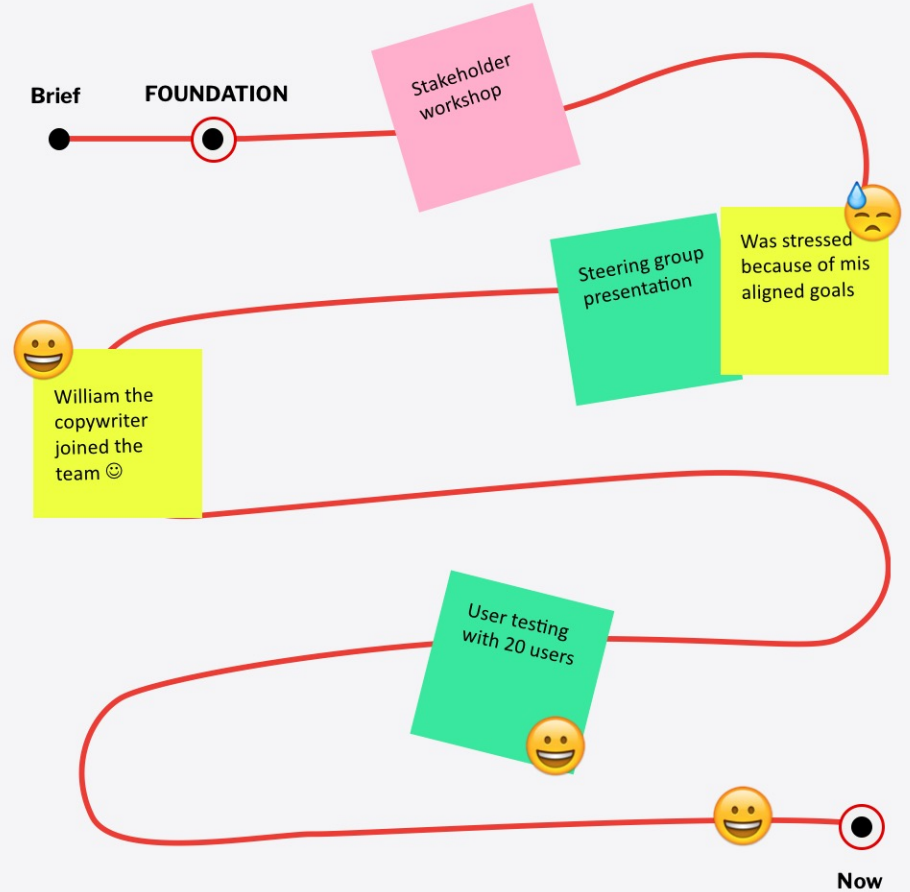


MY JOURNEY IN THE GROUP

GROUP EXERCISE

Are there any events or milestones I want to share with the team?

What is my emotional curve?



Sample Journey



Project brief

Stakeholder workshop

Steering group presentation

User testing

Delivery phase 1

APR

MAY

JUNE

JUL

AUG

Joe
Was stressed because of misaligned goals

Joe
David our lead developer quit

Sofie
David quit

Joe
Rushing to meet our deliverables

Joe
William the copywriter joined the team 😊

Joe
They were happy with the progress

Joe
Got a lot of good feedback from users

Joe
We made it out alive!



Start, Stop, Continue

EXAMPLES

We should stop arriving late at meetings

We should start having more alignment sessions

We should continue with weekly feedback



Sample Start, Stop, Continue

START, STOP, CONTINUE

Start

Specific suggestions about how we could proceed from now on

More alignment sessions

Stop

What we should stop doing - that is harmful for collaboration or project

Stop arriving late at meetings

Have long unnecessary meetings

Continue

What is working well and should be mentioned

Feedback Fridays

Close collaboration



3. PRIORITISE

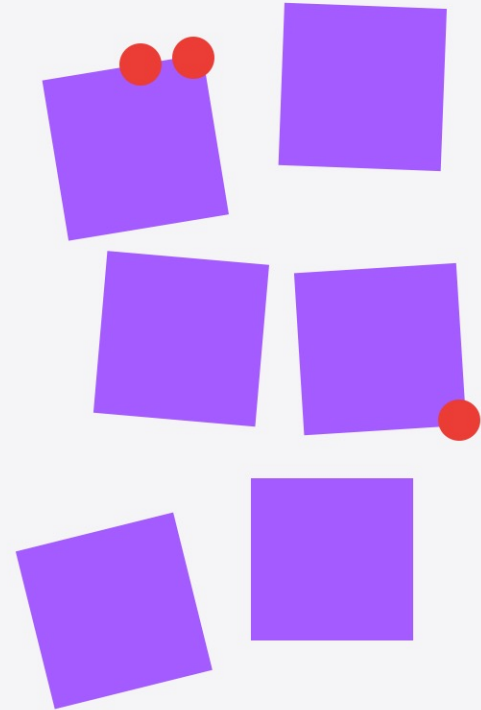
Actions and responsibilities

15 MINS

ACTIONS AND RESPONSIBILITIES

GROUP EXERCISE

Prioritise findings and translate them into actions





4. FEEDBACK SESSION

Regular opportunities to strengthen relationships
and build self-knowledge

30 MINS

What can we tell each other that will help us improve individually and together?



Sample Feedback templates

WISH & STAR

From, Daniel

A star for something I liked with what you did

How well and smoothly you facilitated the client

meeting.

A wish for something that you could improve

Follow-up more clearly and frequently on

everyone's actions/to-do's

STRONGEST IMPRESSION

From, Daniel

My current strongest impression of you upto this point is

Your positive energy and passion for team

collaboration

Something I'm curious about is

To hear more about your interest and previous

experience in Robotics.

Sample Feedback templates

A CHALLENGE FOR NEXT STEP

From, Daniel

When you Presented to the large client team

it makes me feel Included & inspired when you gave lots of
relevant examples & stories in a visual fun way

for next time I encourage you to Add a clear summary at the
end

LOVE BOMBING

From, Daniel

When you Take time to hear my opinion

it makes me feel Valued, respected and listened to

I'd like you to continue with Letting me know if you

need any input

Sample Feedback templates

TOUGH LOVE

From, Daniel

When you Made your points when I was trying to explain the problem I had during the meeting

it made me feel Interrupted and frustrated

I need to feel Listened and respected

would you be willing to Give me the time and space to give you the full picture first ?

ALL DONE!

Don't forget to check out.

CHECK OUT

Reflect on the session as a team

5 MINS



TEMPLATES

START, STOP, CONTINUE

Start

Specific suggestions about how we could proceed from now on

Stop

What we should stop doing – that is harmful for collaboration or project

Continue

What is working well and should be mentioned

PROJECT TIMELINE

Project name: _____

Draw out the most important milestones

You can also print a monthly schedule of your project



A CHALLENGE FOR NEXT STEP

From,

When you

it makes me feel

for next time I encourage you to



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LOVE BOMBING

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STRONGEST IMPRESSION

From, _____

My current strongest impression of you upto this point is

Something I'm curious about is



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WISH & STAR

From, _____

A star for something I liked with what you did

A wish for something that you could improve



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