Crafting an intentional process

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LeadDev Together, Spring 2021

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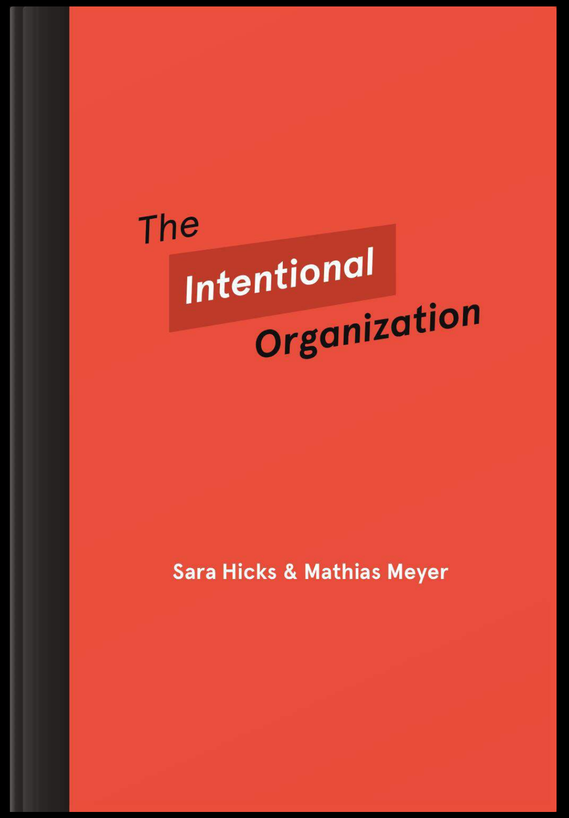
Hello, I’m Sara!

Product, Design, and Engineering Leader

- VP of Product, Mailchimp
- Leadership Coach



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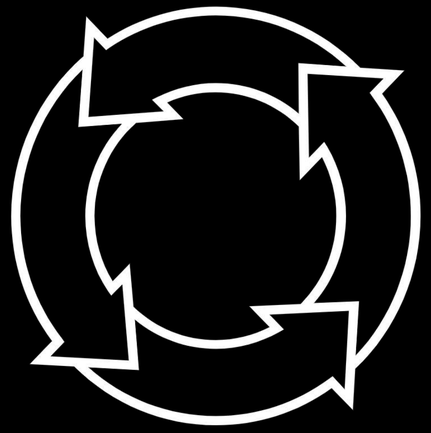
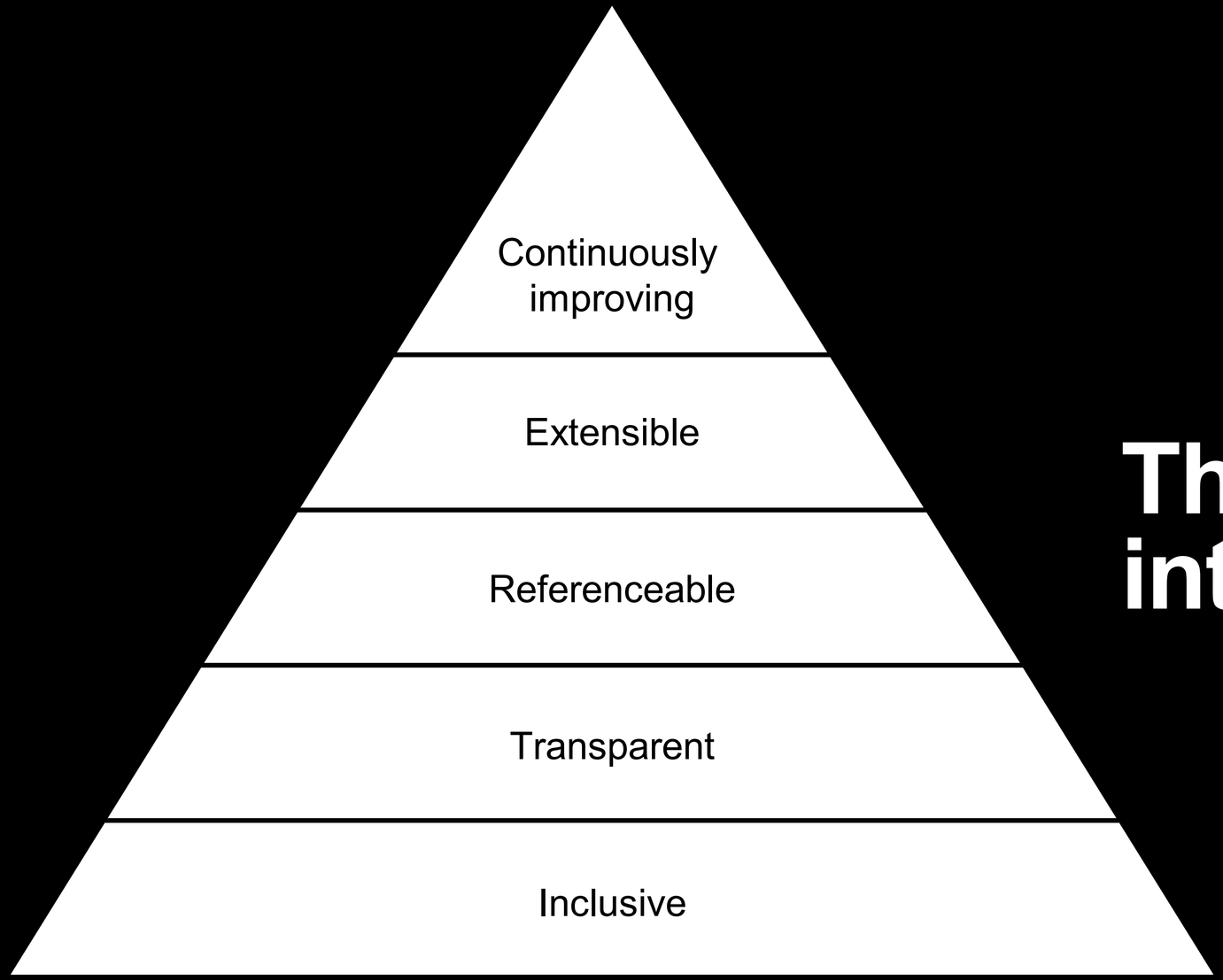
Crafting an intentional process

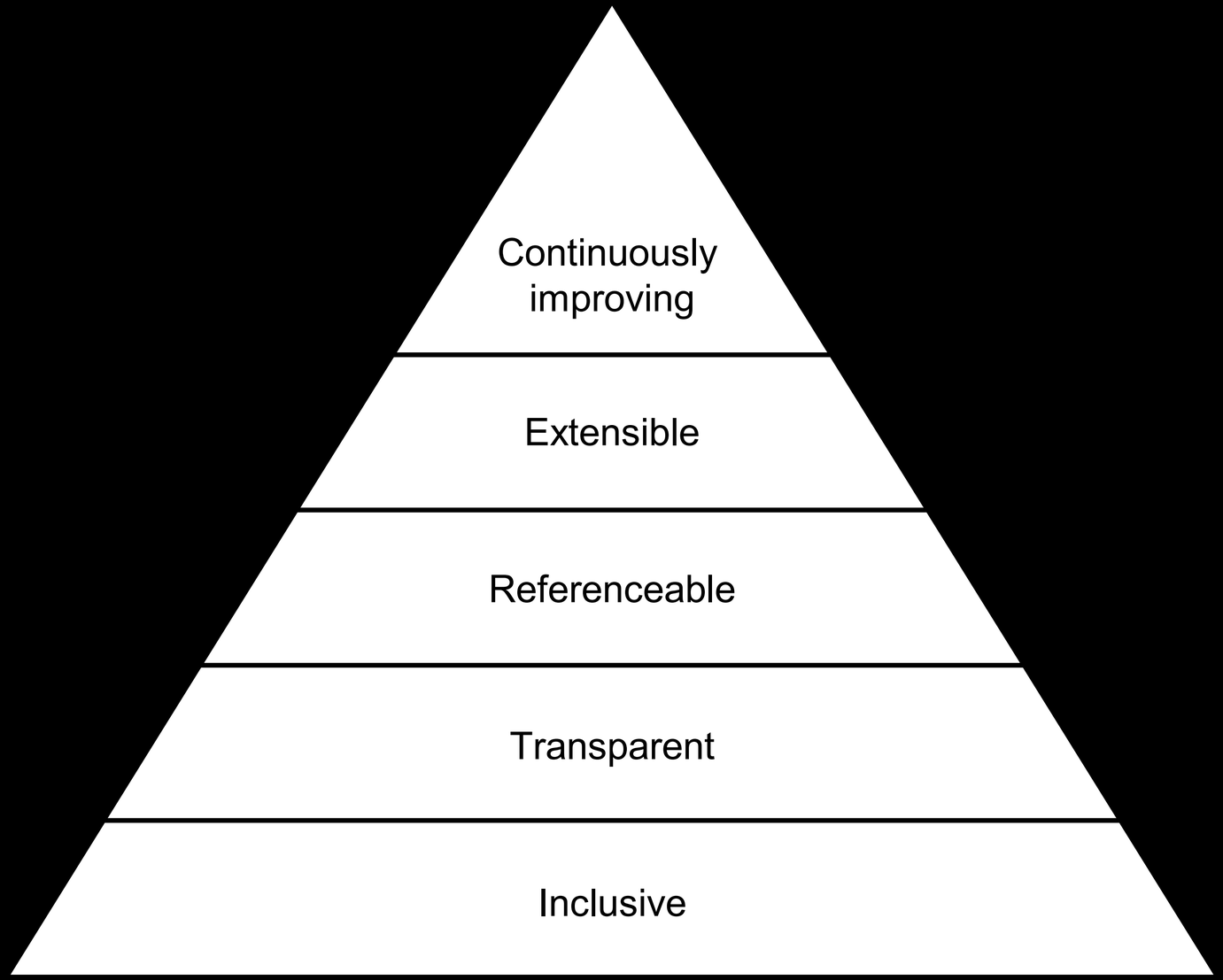
1. What is an intentional process?
2. Things to avoid when creating a process
3. Example of a bad and good process



What is an intentional process?

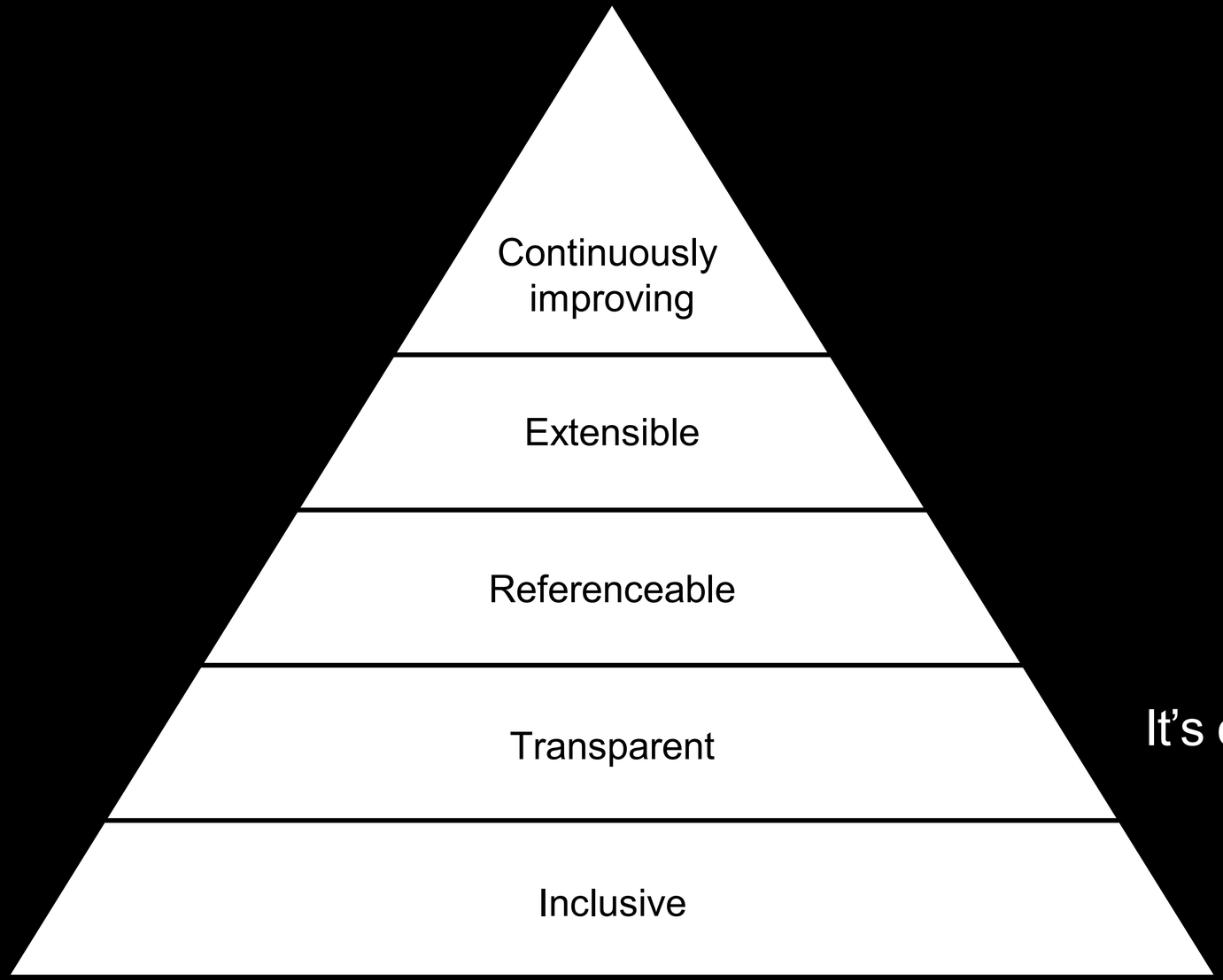


The 5 layers of an intentional process



The 5 layers of an intentional process

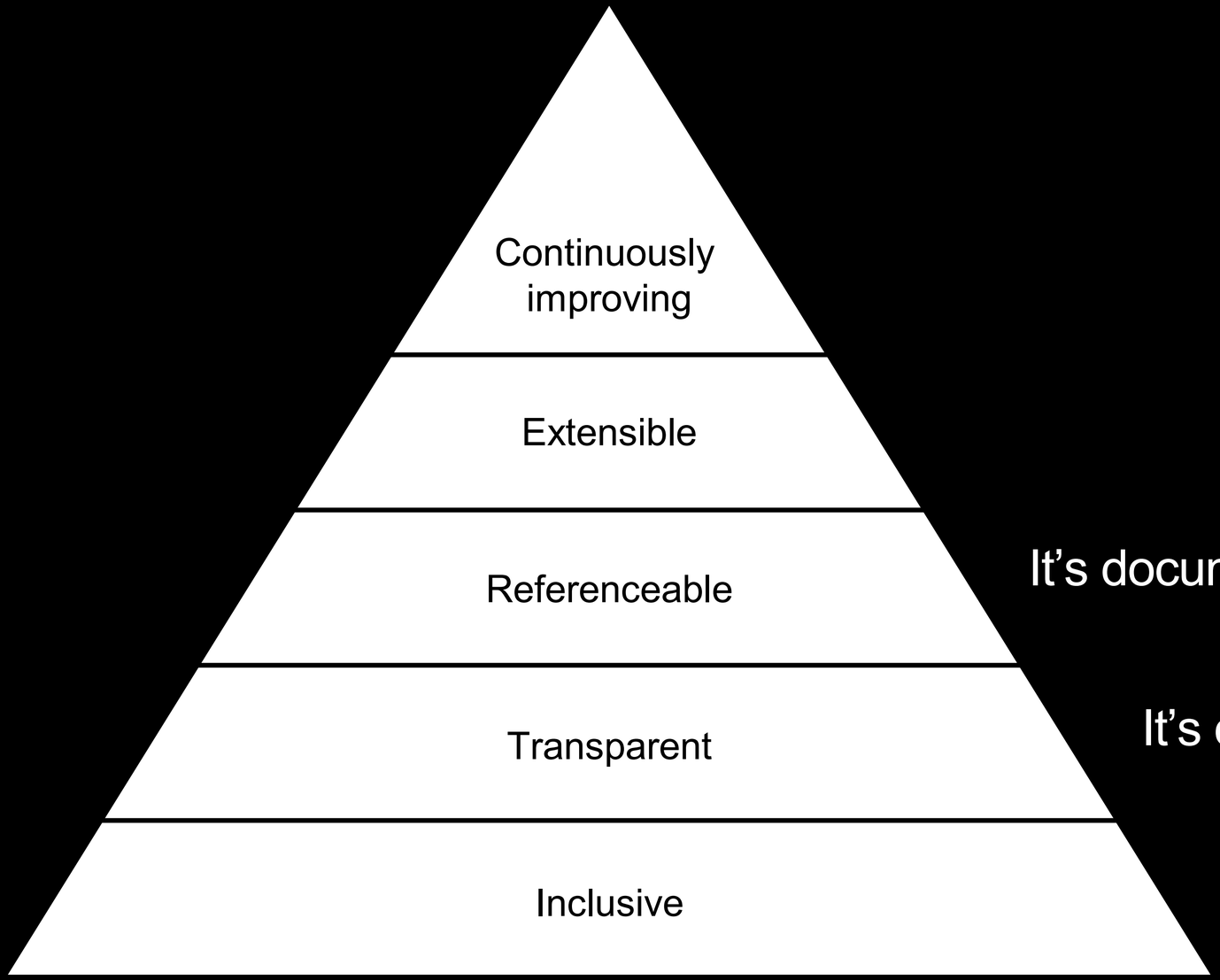
It’s accommodating to all voices and inputs



It’s open with a clearly defined purpose

It’s accommodating to all voices and inputs

The 5 layers of an intentional process

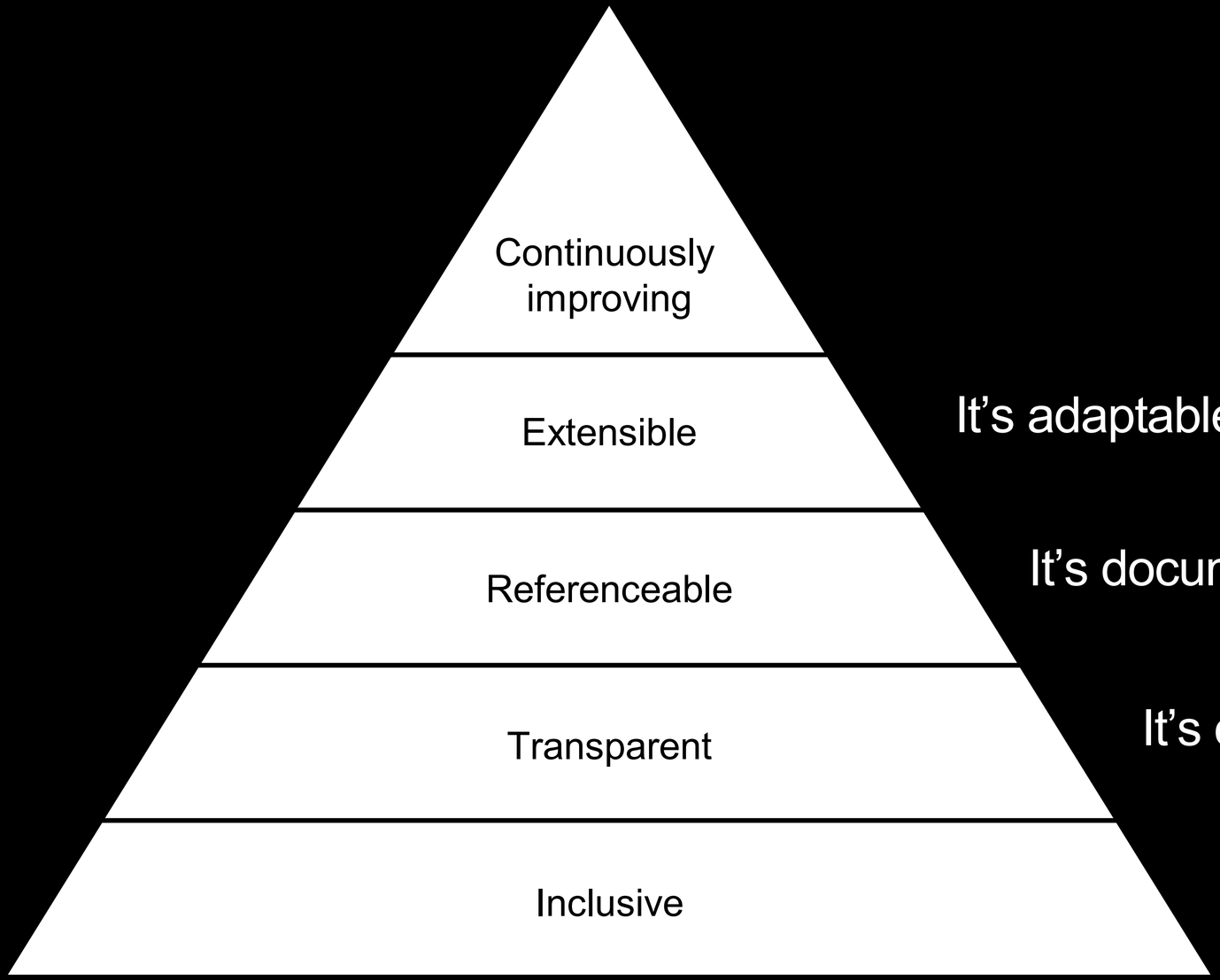


It’s documented and accessible

It’s open with a clearly defined purpose

It’s accommodating to all voices and inputs

The 5 layers of an intentional process



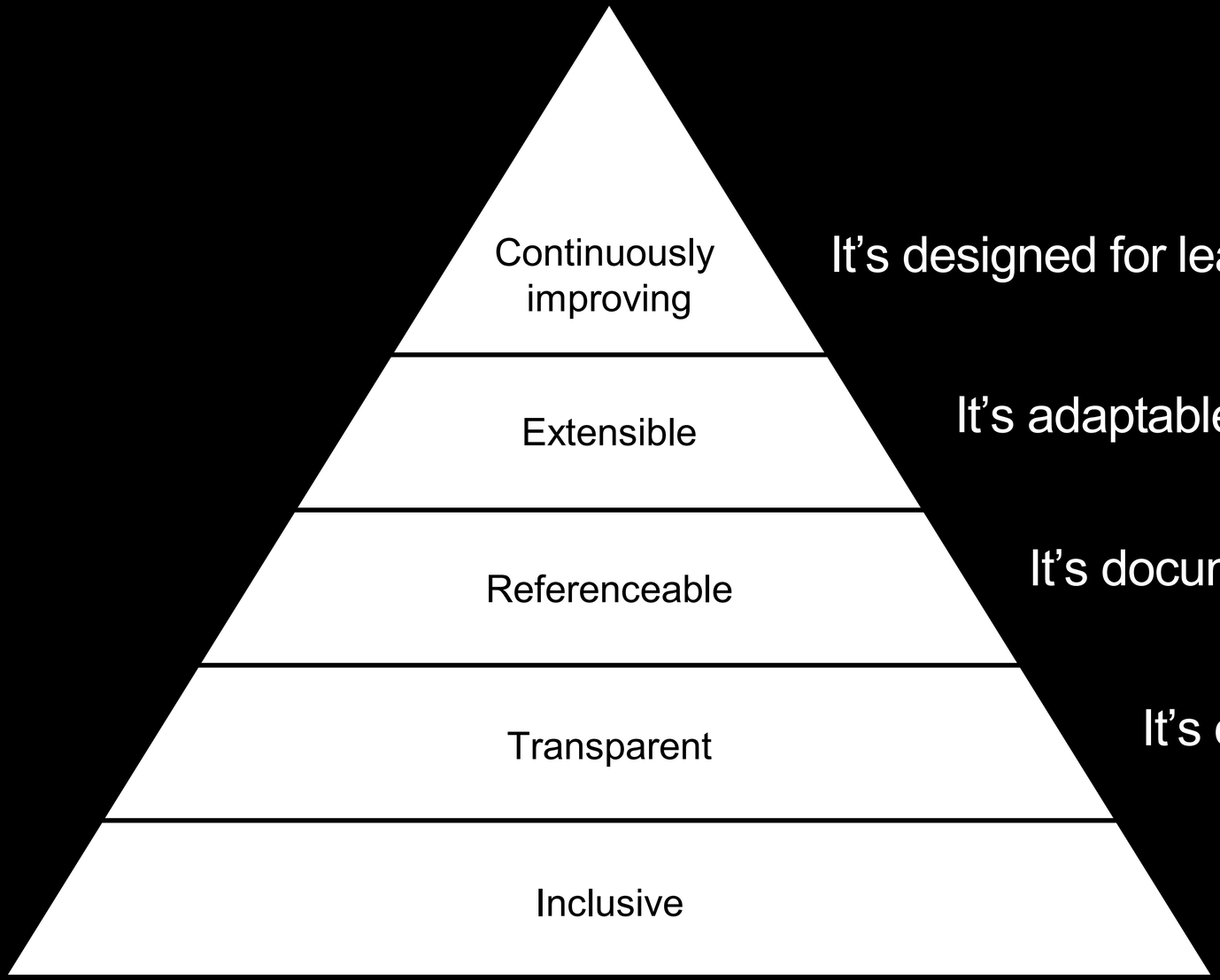
It’s adaptable

It’s documented and accessible

It’s open with a clearly defined purpose

It’s accommodating to all voices and inputs

The 5 layers of an intentional process



It’s designed for learning

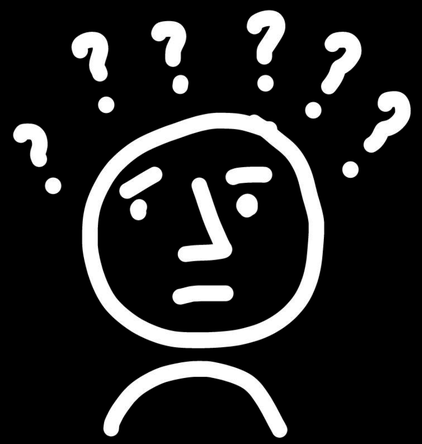
It’s adaptable

It’s documented and accessible

It’s open with a clearly defined purpose

It’s accommodating to all voices and inputs

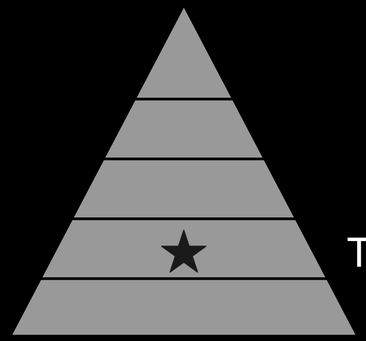
The 5 layers of an intentional process



Things to avoid when creating a new process

Things to avoid when creating a process

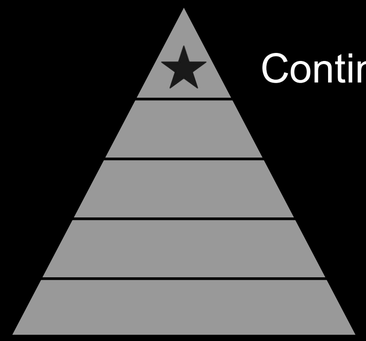
Avoid surprises



Transparency

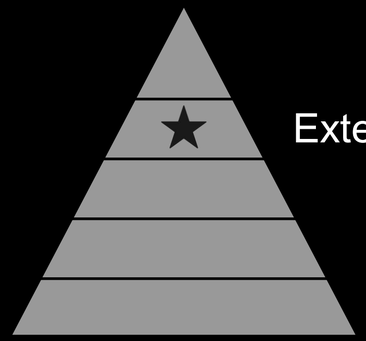
Things to avoid when creating a process

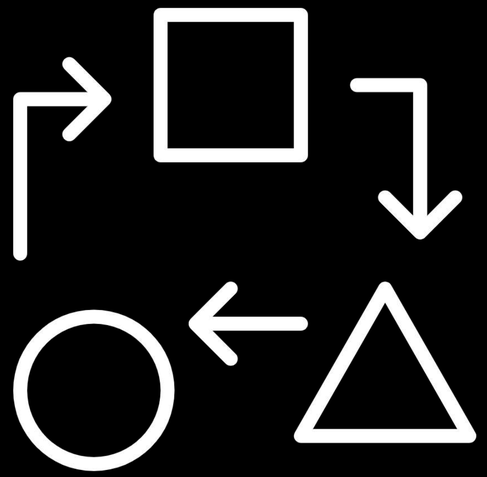
Avoid big, sweeping changes



Things to avoid when creating a process

Avoid too much process





Why an intentional process matters

Why an intentional process matters

Saves time (and money)

Why an intentional process matters

Builds trust and safety

Why an intentional process matters

Adds clarity

Why an intentional process matters

Leads to more creativity

How to know when you need a process

How to know when you need a process

It’s complicated!

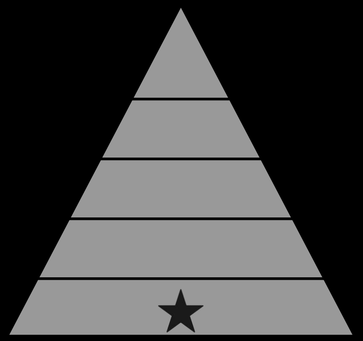
How to know when you need a process

1. There are challenging outcomes even with good intentions
2. There’s significant doubting and questioning
3. The team isn’t on the same page

Distributed teams and process

Distributed teams and process

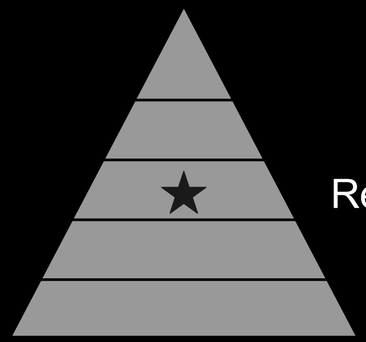
Asynchronous first



Inclusive

Distributed teams and process

Documentation, documentation, documentation



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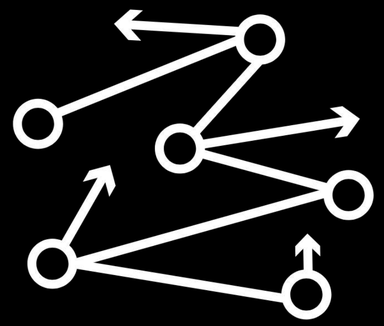

Example of an inclusive process

Example of a good process

- We started by creating a document outlining the purpose.

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- We discussed with leadership and got their approval.

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- We started by creating a document outlining the purpose.
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- We got a cross-functional team together.

Example of a bad process

- We started by creating a document outlining the purpose.
- We discussed with leadership and got their approval.
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- We didn’t have enough representation from the existing team.

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- We started by creating a document outlining the purpose.
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- We had regular synchronous and asynchronous check ins.

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- We documented our progress and we time-boxed the process.

Example of a good process

- We started by creating a document outlining the purpose.
- We discussed with leadership and got their approval.
- We got a cross-functional team together.
- We didn’t have enough representation from the existing team.
- We had regular synchronous and asynchronous check ins.
- We documented our progress and we time-boxed the process.
- We came to a recommendation.

Example of a bad process

- ✓ We started by creating a document outlining the purpose.
- ✓ We discussed with leadership and got their approval.
- ✓ We got a cross-functional team together.
- ✗ We didn’t have enough representation from the existing team.
- ✓ We had regular synchronous and asynchronous check ins.
- ✓ We documented our progress and we time-boxed the process.
- ✓ We came to a recommendation.
- ✗ The team was surprised.

Example of a continuously improving process

Example of a good process

- We decided to do a retrospective to learn and improve.

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- We invited an independent person to help us.

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- We held multiple sessions for the team to be able to share.

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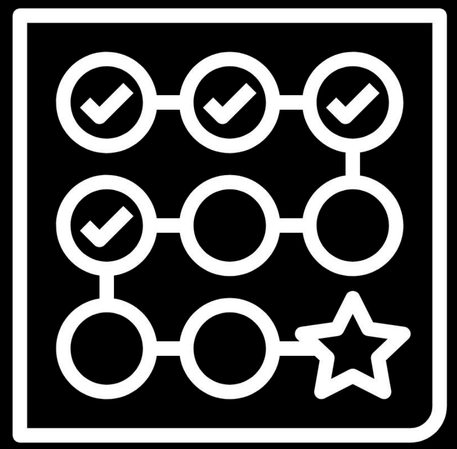
- We turned learnings into action items and owners.

Example of a good process

- We decided to do a retrospective to learn and improve.
- We invited an independent person to help us.
- We created a document outlining the purpose and goals.
- We held multiple sessions for the team to be able to share.
- We came up with a prioritized list of key learnings.
- We turned learnings into action items and owners.
- We’re communicating regular updates on our progress.

“When I look back over the last 25 years,
in some ways what seems most precious
is not what we have made but
how we have made it
and what we have learned…”

- Sir Jony Ive



Different types of processes & a template

Different types of processes & a template

- Process maps
- Value streams
- Decision process
- One-on-ones
- Incident analysis

- Retrospectives
- Design reviews
- Checklists
- and many, many more…

Different types of processes & a template

- [x] Document status & summary
- [x] Purpose
- [x] Background
- [x] Decision
- [x] Consequences

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A case study

Boeing B-17 Flying Fortress (Model 299)

Photo credit: National Museum of the U.S. Air Force

October 30, 1935

Photo credit: National Museum of the U.S. Air Force

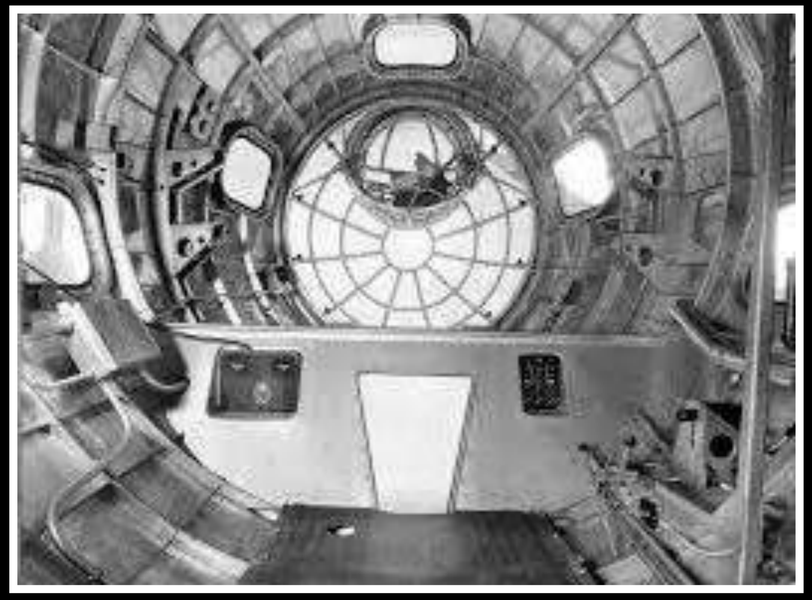

Photo credits: National Museum of the U.S. Air Force

Cockpit Conversation

LIFE Magazine
August 24, 1942

COCKPIT CONVERSATION

Pilot and copilot check on everything before taking on the complicated job of flying a four-engine bomber

Every day now, at some U. S. Army Air Force School, some training pilot is learning how to handle a four-engine bomber. He climbs into the big plane, crawls into the left-hand cockpit seat and there is confronted by the big and complicated instrument board shown above. Under his hands are bunches of buttons and levers. At his side sits a copilot. By manipulating the levers, pushing the switches and watching the instrument dials, he learns the complex job of pilot in a Flying Fortress. Finally to take off, he checks with the copilot and this is the conversation that always follows:

"Check list," says the pilot. His copilot fishes out a printed form from a briefcase.

"Gear switch?" asks the copilot.

"Neutral," replies the pilot.

"Nose locked. Fuel shut-off switches?"

"On."

"Booster pumps?"

"On."

"Superchargers?"

"Off."

"Throttles?"

"Closed."

"Propellers?"

"High R.P.M."

"Flight controls?"

"Unlocked, checked."

"Gear in sync?"

"Okay left."

"Okay right," adds the copilot. "Master switch?"

"On."

"Ignition switches?"

"On."

"Battery switches?"

"On."

"All pressure No. 1?"

"Coming up."

They repeat starting procedure on engines No. 2, 3 and 4.

"Hydraulic valve normal," suggests copilot. "Intercoolers, cold. Booster pumps?"

"On."

"Cowl flaps open right."

"Open left."

"Locked. Propellers?"

"High R.P.M."

"Battery switches?"

"On."

"Radio on. Mixture controls?"

"Automatic rich."

"Wing flaps, checked. Hydraulic pressure?"

"Okay."

"Trim tabs?"

"Set for takeoff."

"Mixed checks out right," says the copilot.

"Set left."

"Tail wheel unlocked. Brakes, standing by."

Clumsily, hesitantly, the bomber picks its way among planes on either side and to the border of the takeoff runway.

"Brakes locked," drones the copilot.

"Magnetos?"

"Checked."

"Superchargers?"

"Set."

"Engines?"

"Run up."

"Flight controls?"

"Unlocked and free."

The pilot again checks with the control tower, receives permission to take off.

"Brakes?"

"Unlocked."

LIFE Magazine, August 24, 1942

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