

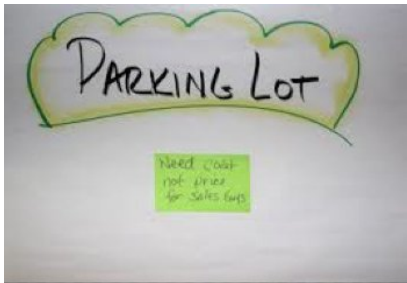









Tool Name	How To Use	When to Use																																			
<p style="text-align: center;">Meeting PAL (Purpose, Agenda, Length)</p> <p>Meeting Date:] Location:] Start Time:] <i>Typically reflected within the meeting invite</i> Invitees:]</p> <p>Purpose: To prioritize Accounts Payable change requests 0740 – 0762).</p> <p>Agenda:</p> <ul style="list-style-type: none"> • Review with Q&A the 22 change requests. Led by Sam Jones. 35 min • Determine prioritization method to be used. Led by Sue Holms. 5 min. • Initial prioritization. Led by Sue Holms. 15 min. • Challenge round. Led by Sam Jones. 15 min. • Final prioritization. Led by Sue Holms. 10 min. • Sign off. Led by Michelle Davis. 10 min. <p>Duration: 1.5 hours</p>	<p>Elements of a meeting PAL</p> <p>Purpose: Explain why the meeting is taking place and what you hope to accomplish.</p> <p>Agenda: List planned topics, and who is expected to lead the discussion & anticipated duration. <i>Be sure to check with the people you hope will lead topics prior to the meeting.</i></p> <p>Length: X hour(s)/minutes (The overall planned length of the meeting.)</p>	<p>Always use a meeting “PAL” as it will help everyone come prepared and participate fully.</p>																																			
<p style="text-align: center;">Start Your Day</p> 	<p>On the top of sheets of easel paper or white board sections, list out common business intervals that need to be considered when eliciting business requirements for your specific initiative(s).</p> <p>Invite the meeting attendees to simply write down needs for those intervals on post-it notes and stick them on the appropriate sheet.</p> <p>Let them float around the room adding needs under the intervals.</p> <p>When complete, discuss the needs and obtain clarity. <i>(Keep – Modify – Remove)</i></p>	<p>This is a great tool to ensure intervals are considered in both design and test case development.</p> <p>Business users won’t always think about month-end, quarter-end and year-end requirements without being reminded to think about those needs.</p>																																			
<p style="text-align: center;">RACI Matrix</p> <table border="1" data-bbox="219 1398 621 1575"> <thead> <tr> <th></th> <th>ROLE 1</th> <th>ROLE 2</th> <th>ROLE 3</th> <th>ROLE 4</th> </tr> </thead> <tbody> <tr> <td>TASK 1</td> <td>R</td> <td>C</td> <td>I</td> <td>A</td> </tr> <tr> <td>TASK 2</td> <td>I</td> <td>I</td> <td>R</td> <td>A</td> </tr> <tr> <td>TASK 3</td> <td>C</td> <td>R</td> <td>A</td> <td>I</td> </tr> <tr> <td>TASK 4</td> <td>A</td> <td>R</td> <td>I</td> <td></td> </tr> <tr> <td>TASK 5</td> <td>R</td> <td>A</td> <td>C</td> <td>I</td> </tr> <tr> <td>TASK 6</td> <td>C</td> <td>C</td> <td>A+R</td> <td>I</td> </tr> </tbody> </table>		ROLE 1	ROLE 2	ROLE 3	ROLE 4	TASK 1	R	C	I	A	TASK 2	I	I	R	A	TASK 3	C	R	A	I	TASK 4	A	R	I		TASK 5	R	A	C	I	TASK 6	C	C	A+R	I	<p>Fill out the framework of the RACI prior to the meeting. Include tasks/roles down the left hand column and project team roles across the top leaving the remainder of the grid empty.</p> <p>Invite the project team members to, under his/her role, reflect an “R” where responsible for the task, “A” where accountable for the task, “C” when one should be consulted and an “I” when they just need to be informed.</p> <p>Once complete, review the chart to see if what’s been identified will work.</p> <p>As a team make adjustments until everyone is on the same page.</p>	<p>Many times teams struggle because roles are not clearly defined, understood and/or agreed upon.</p> <p>Don’t rely on generic project team role documents – help the team move through storming and into performing by ensuring everyone understands who is expected to do what.</p> <p>Don’t reserve this exercise for kick-off sessions alone. Use this when you see that lack of roles and responsibilities is the root cause of team “storming.”</p>
	ROLE 1	ROLE 2	ROLE 3	ROLE 4																																	
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<p data-bbox="321 275 509 310">Sticker Voting</p> 	<p data-bbox="646 296 1040 352">Create a list of the items that need to be prioritized.</p> <p data-bbox="646 384 1076 436">Give everyone 5 to 10 stickers depending on the situation.</p> <p data-bbox="646 468 1076 552">Let everyone place his/her stickers/votes on the line of the item(s) he/she believes is most important.</p> <p data-bbox="646 583 1057 667">Once done, the list will be prioritized. You will want to review the list and make any minor adjustments as needed.</p>	<p data-bbox="1110 296 1495 436">To save time working through contention or to promote engagement and collaboration, this simple tool can make a big impact to your team progress.</p>
<p data-bbox="337 743 493 779">Parking Lot</p> 	<p data-bbox="646 764 1062 821">Mark off an area on a white board or easel and use "PARKING LOT" as a heading.</p> <p data-bbox="646 852 1076 1052">Tell people at the beginning of the session that while you plan to keep everyone focused as the group works through the meeting agenda, when a good idea or questions comes up that's off topic, you will place it in the Parking Lot so that it's captured.</p> <p data-bbox="646 1083 1068 1224">If there is time at the end of the meeting, work through items on the list. If not, include them in meeting notes to ensure they are addressed at the appropriate time and not lost.</p>	<p data-bbox="1110 764 1500 993">When you aren't sure if there is enough time to cover all of the topics on the agenda, when you know some attendees have a tendency to let thoughts wonder off topic, when discussing multi-faceted topics: these are all good times to use a meeting Parking Lot.</p> <p data-bbox="1110 1024 1495 1140">It is important to notice when this is happening, to stop it gracefully by capturing the thought, then park it and bring the group back to the agenda.</p>
<p data-bbox="298 1297 532 1333">On Your Way Out</p> 	<p data-bbox="646 1318 1081 1493">As a meeting is coming to a close, share with the attendees that you're running out of time and invite them to grab a post-it pad or piece of paper laying around and just jot down any concerns they have about the project and leave them on the table.</p> <p data-bbox="646 1524 1052 1577">This is a "risk free" way for participants to share concerns.</p>	<p data-bbox="1110 1318 1484 1459">How easy is this one? You'll know the best time to take advantage of this exercise and once you collect the concerns, you can address them as appropriate.</p>

Tool Name	How To Use	When to Use
<p style="text-align: center;">Fist-to-Five (aka Fist-of-Five)</p> <p> 5 = Absolutely!</p> <p> 4 = Yes</p> <p> 3 = O.K.</p> <p> 2 = I'd rather not, but if...</p> <p> 1 = No</p> <p> 0 = Never!</p>	<p>To use this technique the Team Leader restates a decision the group may make and asks everyone to show his/her level of support. Each person responds by showing a fist or a number of fingers that corresponds to their opinion.</p> <p>Fist A no vote - a way to block consensus. I need to talk more on the proposal and require changes for it to pass.</p> <p>1 Finger I still need to discuss certain issues and suggest changes that should be made.</p> <p>2 Fingers I am more comfortable with the proposal but would like to discuss some minor issues.</p> <p>3 Fingers I'm not in total agreement but feel comfortable to let this decision or a proposal pass without further discussion.</p> <p>4 Fingers I think it's a good idea/decision and will work for it.</p> <p>5 Fingers It's a great idea and I will be one of the leaders in implementing it.</p> <p>If anyone holds up fewer than three fingers, they should be given the opportunity to state their objections and the team should address their concerns. Teams continue the Fist-to-Five process until they achieve consensus (a minimum of three fingers or higher) or determine they must move on to the next issue.)</p>	<p>Whenever a group is discussing a possible solution or coming to a decision on any matter, Fist-to-Five is a good tool to determine what each person's opinion is at any given time</p>