



## BACKGROUND

The Plus/Delta process is a time-honored part of lean canon, used to surface after-event feedback & foster continuous improvement. *But does it work?* This A3 suggests that it doesn't! It then proposes a more effective method.

## CURRENT STATE :: PLUS/DELTA

In the Plus/Delta process, a facilitator simply asks for plusses (aspects that added value) and deltas (changes that would add value next time) about an event or segment of work that has just completed. (source: lean glossary)

In my experience, one usually gets a trickle of responses, and, too often, those responses are superficial: "It was nice having bagels on Tuesday – let's have bagels more often." For teams that make a habit of regular reflection (lean) or retrospectives (Scrum), the few easily accessed deltas of any real weight are surfaced and resolved early in the team's time together. Deeper exploration tends to elude them going forward.

*"[Plus/Delta] looks and feels like the team is having good, reflective conversations. But they're actually learning an unsustainable, ineffective way to retrospect."*<sup>(2)</sup>

## PROPOSAL :: USE FOCUSED CONVERSATION

A Focused Conversation is a conversation on any topic that is guided by a facilitator so that it passes through four levels in a pattern called ORID:

**Observational:** questions about facts and external reality (data). This grounds the subsequent dialog in a common shared understanding. Without this, nobody can see the whole picture & deep insights are unlikely.

**Reflective:** questions to elicit reactions, emotions, associations -- internal responses to external reality. Without this, conversations may be weirdly emotional, circling around issues without surfacing them.

**Interpretive:** questions to draw-out meaning, significance, implications.

**Decisional:** questions to elicit resolution and close the conversation.

Notice that Plus/Delta starts a group at the Interpretive or Decisional level without first aligning about the facts, emotions, or shared meaning.

**Some advantages of Focused Conversation include:**<sup>(1)</sup>

- Prevents the conversation from drifting along aimlessly.
- Pushes people to be creative rather than critical.
- Supports focus, honesty and vulnerability. Facilitates real listening.

## USING ORID FOR AFTER-ACTION REFLECTION

To use this in a Lean reflection or Scrum retrospective, first collect metrics, drawings, photos, statistics, and other relevant data beforehand.

**Opening** :: The facilitator makes a brief opening statement clarifying the purpose of the meeting and the participants' roles. Aim to have a bit more energy than the audience so you lift people up w/o being obnoxious.

**Observational** :: *facts, facts, and more facts*

Display and briefly review the data you've assembled beforehand.

*Ask:* What other facts are missing or unclear? What catches your attention? Compared to our workplan, where are we ahead of schedule? Behind?

*Facilitation:* This level is about diverging, so redirect people who offer feelings or interpretation: "What did you observe that makes you draw that conclusion? Let's save interpretation for later, once we see all the data."

**Reflective** :: *reactions, memories, feelings, associations*

*Ask:* How did you feel during this work? What about now? What emotions did you observe in others?

*Facilitation:* Don't skip this step, but don't overdo it, either! For larger groups, it can be effective to let participants indicate emotional states graphically, such as putting blue dots on facts that were demotivating and red dots on the ones that were motivating, etc.

**Interpretive** :: *drawing-out meaning*

*Ask:* What does this mean? What did you learn? What are the causes and effects? What patterns do you see? Where are we experiencing ease in our work? Where is it harder than it needs to be? What might be causing that?

*Facilitation:* This level is about exploration, and it can take some time (some call this the "groan zone"); help the team sustain its energy.

**Decisional** :: *decide on next steps*

*Ask:* What should we do now? What improvements to our product or processes can we make? What are next steps? Who needs to do them?

*Facilitation:* This level is about converging, so nudge the group toward making decisions.

**Closing** :: Time permitting, use [ROTI](#) to get feedback on the reflection (how meta!). Then, close strong by calling an end to the reflection and thanking the participants for their attention and effort. Maybe try [this](#), too.

Where do the decisions go? If it's a Lean team, these become action items, or revisions to policies or SOPs. If it's a Scrum team, these may become items on the Sprint Backlog or an individual's to-do list, modifications to the team's working agreement, or updates to their Definition of Done.

## NOTES FROM TODD'S EXPERIMENTS

I'm not an expert at facilitating Focused Conversations, but I've been amazed nonetheless how even my first fumbling attempts to use it resulted in more thoughtful, expressive, and *meaningful* reflections. I'm sure an expert facilitator could do better, but that's no reason not to give this process a try; it's easy, enjoyable, and effective.

The inclusion of objective data (we usually look at action items completed vs. unfinished, our latest drawings, and the financial performance of the project) immediately aligns the team's understanding, helping folks bridge between the events and aspects of the work that they were aware of toward a more expansive picture.

Then, sharing emotions & feelings opens-up a whole new dimension of that understanding. For example, a teammate once reported that they felt frantic during a sprint when several other people shared how calm they had felt. That showed an imbalance in work assignments that would have otherwise gone unnoticed. Perhaps more importantly, it engendered empathy among the team, who suggested steps to keep that imbalance from recurring.

**How long does this take?** I've done retros in this format as short as 15 minutes and as long as 45, but these were in the context of reflecting on 2-week sprints with Scrum teams. This approach should easily scale to shorter durations (e.g. reflecting on a meeting).

**Facilitation tips:**

In plus/delta, we often have a scribe who writes down the feedback received. This is a poor approach, as scribes invariably reword or summarize what people say, endowing them with "the power of the pen", modifying the results. Much better to use a digital whiteboard like Miro or (soon!) real PostIts to let people express themselves in their own words.

Some teams get stuck in the decisional level. This is where you'll stretch your facilitator skills to nudge them toward a conclusion without making the mistake of deciding for them. Dot voting is a great way to prioritize ideas. Also check out [Fist to Five](#) for an easy way to see a team's support for a topic.

## REFERENCES

1. The Institute of Cultural Affairs: [The Art of Focused Conversation](#), 2000
2. Humanizing Work: [Facilitating Effective Retrospectives With Miro](#), 2021
3. Margaret Taylor, blog post: ["ORID: A simple method for reflection"](#), 2015