

Balanced Team Pie

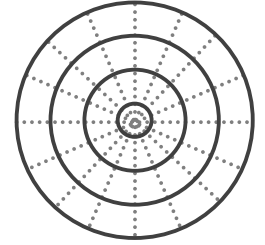
How-to Guide



Skills visibility for product teams.

A quick activity to create a visualization that shows what skills you have in your team, where there are overlaps, and where there are gaps.

Balanced Team Pie



A quick activity to help product teams to clarify team skills | LUXr.co

An extension of an activity introduced by Moses Hohman [see History].

Balanced Team Conference 2013: <http://lanyrd.com/2013/balancedteam/>

This activity identifies the most critical skills needed for your team and your product to be successful.

In this workshop, you'll create a visualization that clearly shows what skills are present in the team, where there are overlaps and where there are gaps.

Purpose

- * Identify key areas of competency needed by the product team.
- * Get to know the skills & expertise of team members.
- * See where team skills overlap and identify gaps to be filled.

Outcome

- * A visual overlay showing the distribution of skills in key areas important for product success.
- * Clarity in roles & expertise of team members.
- * Clearly identified gaps in skills.

Time

- * About an hour minutes for a team of 5. (Smaller teams will take less time.)
- * Follow-up discussion can take up to an hour, but doesn't need to happen in the same session.

Basic materials

- * Instruction set
- * Pack of stickynotes, 1 per participant
- * Sharpies, 1 per participant
- * Whiteboard markers, one color per participant
- * Red whiteboard marker

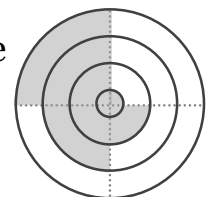
Materials to prepare in advance:

- * Team pie printout, printed on white paper.
1 copy per participant; 1 copy for the facilitator.
- * Team pie worksheet, printed on clear transparency film.
1 copy per participant; 1 copy for the facilitator.

The clear film is super-important. It's what makes the activity work.

Instructions

1. *The first task is to list out areas of competency that you need to make your product successful. Keep it at a fairly high-level, like Code Development, UX Design, Marketing or Accounting. Working individually, each team member writes out their ideas, one idea per sticky note. Aim for 10-15 stickies per person. [5 minutes]*
2. Put all the sticky notes up on a wall. As a team, cluster the sticky notes (like with like) into groups. Label each group [10 minutes]
3. As a team, prioritize the top 5-10 groups. (Note that the fewer groups you have, the more quickly the activity will go. However, don't artificially constrain the number of groups. If you have 10 groups, go with it.) [10 minutes]
4. Weight the top items by importance...how key is this area of effort to the success of the team? The total should equal 100%. [10-15 minutes]
5. Using the percentages, the facilitator makes a template pie chart on a white printout of the Team Pie, drawing in the divisions based on the percentages and labeling each slice with the group name. [5 minutes]
6. Once the facilitator has created the Template Pie Chart, all participants draw the same template on their Team Pie white printout. Note: It's critical that everyone be working from the same template, otherwise the information won't be accurate. [5 minutes]
7. Working independently, each team member fills in their skills experience on their pie: lay the Team Pie Worksheet (clear transparency film) on the template and grab your whiteboard marker. Using the slices and the target lines as a guide, color in each circular area per slice with the amount of skills that you have, like this:
 - * **innermost ring:** Some exposure and/or theoretical knowledge
 - * **up to the 2nd inner ring:** Have done this before
 - * **up to the 3rd ring:** Done this many times, feel confident
 - * **all the way to the outermost ring:** Have a lot of expertise
8. When everyone is done, stack the Team Pie Worksheets on top of each other and hold them up. (Don't forget to label and date each one.)
9. The density of color will show you where the team has overlapping skills. Lighter areas show where the team has some skills. Open areas are gaps in the team.
10. On the clear transparency film Team Pie Worksheet, use the red whiteboard marker to fill in the areas that are open gaps. Label this as the "Gaps" pie.



Follow-up Discussion

The purpose of seeing team skills in this visual way is to help the team have clear and candid conversations about how well set up they are for success. Areas to focus the discussion are:

- Shared skillsets
- Key skills that are present, but not mature
- Key skills that are missing or underdeveloped.

▪ **Shared skillsets**

As a team, discuss the **areas of overlap**. These show **shared skillsets**. This is a good time to identify roles and responsibilities to clarify areas where there may be competition or conflict. Overlapping skill areas are fruitful areas for collaboration and pairing.

Discussion prompts:

- Are the team members with these skills able to collaborate effectively?
- What benefit does the team derive from shared skills, and how can we capitalize on this to be successful?
- Are there areas of responsibility, accountability and authority that would be helpful to clarify further?

▪ **Key skills that are present, but not mature**

Next, identify areas where **coverage is thin and doesn't extend out to the outermost ring**. These are skills that are **present but not mature**.

Discussion prompts:

- How critical is expertise in this area?
- How will the team get the level of skill needed to be successful? (education? on the job learning? outsourcing? new hires? other ideas?)

▪ **Key skills that are missing or underdeveloped**

Lastly, identify slices that are **completely clear** or where **coverage is thin and only extends as far as the 2nd ring**. This is the area of significant gaps.

Discussion prompts:

- How critical is expertise in this area?
- How will the team get the level of skill needed to be successful? (education? on the job learning? outsourcing? new hires? other ideas?)

Next Steps

After the discussion, capture the tasks to follow up on as a list for next steps. Take a picture of each individual pie, the overlay team pie, the gaps pie and the next steps. Be sure to put a date on them.

Check back in 2-3 weeks to see what has changed, and if the follow-up steps are on target.

It's helpful to do this activity once a quarter to see what changes and what new skills and competencies are emerging.

Questions, comments or improvements?
Give a shout: Kate Rutter [[@katerutter](#) | [intelieto.com](#)]

History of the Balance Team Pie idea

- Inspiration: Steve Blank, Hiring – Easy as Pie [*blog post, Aug 22, 2011*]
<http://steveblank.com/2011/08/22/hiring-easy-as-pie/>
- Team experience: Moses Hohman, Human Practice
Building Balanced Team Culture from Day One [*presentation deck, Sep 24, 2011*]
<http://www.slideshare.net/balancedteam/06-sat-moses-hohman-balanced-team-conference-talk>
- Activity for teams: Kate Rutter, Luxr
Balanced Team Pie Activity [*activity workshop instructions, November 12, 2011*]
- Revised activity: Kate Rutter, Luxr + Intelieto
Balanced Team Pie Activity at the Balanced Team Conference, November 3, 2013

Printing Notes for template

Print on white paper:

- 1 copy per participant
- 1 copy for the facilitator

Print on clear acetate:

- 1 copy per participant
- 1 copy for the facilitator

You can get clear acetate or transparency paper in most office-supply stores and online at amazon.com. It's available for ink-jet printers, laser-printers and copiers. It's about \$25 for 100 sheets. Many local copy shops carry it as well, and you can buy it by the sheet.

A recommended brand: 3M PP2500 Plain Paper Copier Transparency Film
\$26 for 100 sheets
(Available on Amazon)

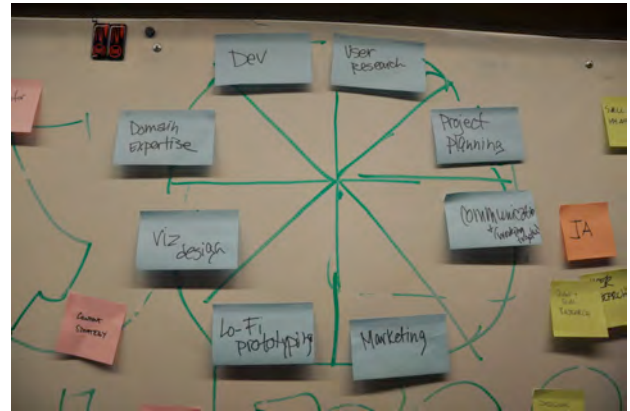


What it looks like in practice

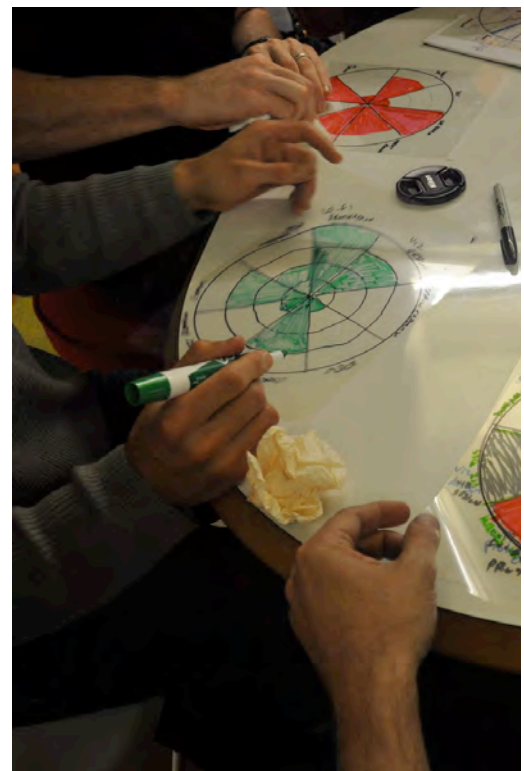
These photos are from the workshops at the Balanced Team conference in 2011 and 2013.



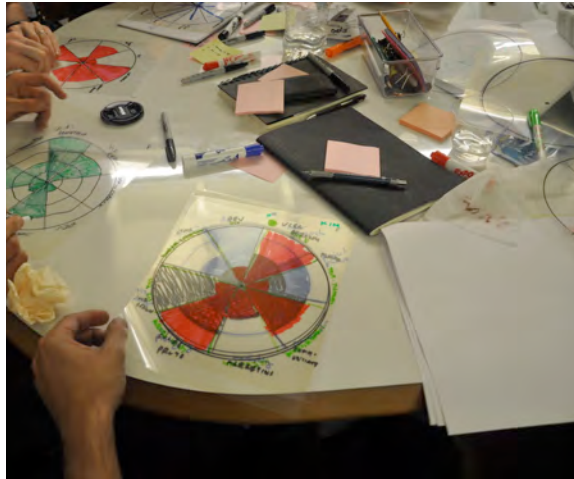
Brainstorming areas of competency



Filling out the skills pies



Comparing pies



Finding overlaps & gaps

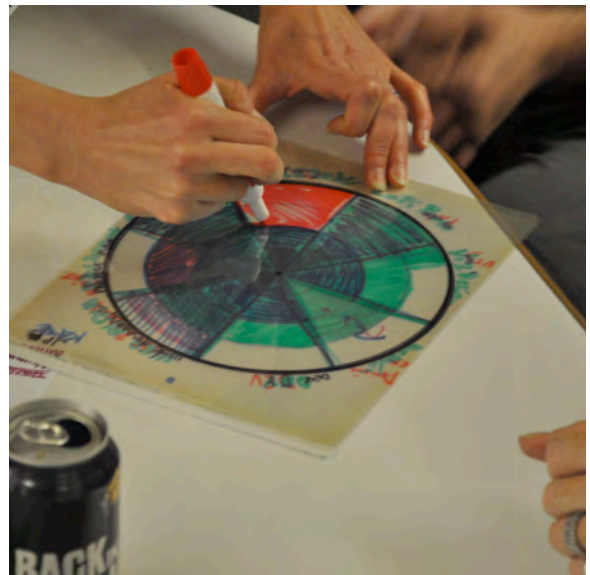


Photo credits: Chris Nodder, <http://www.questionablemethods.com/>

Balanced Team Pie } A quick activity to help product teams to clarify team skills
Balanced team + Luxr.co

Team _____

Name _____

Date _____

