



# **Finding Your Way: Orienteering for Managers**

**Velocity, Oct. 3<sup>rd</sup>, 2017  
in New York  
VM Brasseur  
& Deb Nicholson**

**OMG START THE TIMER**

# Introductions

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Introduce each other.

**Deb:** Director of Community Outreach, Open INVENTION Network (defensive and non-aggressive patent pool). She's a frequent and excellent conference speaker and has forgotten more about leadership & organising than most of us will ever learn in our lives.

Vicky is a tour de force of open source! She's an excellent technical manager, business savvy advisor, coveted mentor and an accomplished public speaker.



VMB

The slides are already available at Internet Archive, both with and without speaker notes.

We'll show you this URL again near the end of the presentation.

Administrivia out of the way, I'll hand it over to Deb to set up some context for the talk today.



DEB So, you have a shiny new job as a manager or you somehow worker-beed your way into a benevolent dictator role... with a cross-functional team, with a mix of paid and unpaid folks, and people all over the globe... now what?

# Many different goals

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DEB - Well, there will almost certainly be some mismatched ideas about what the default is or should be. Bringing these very disparate people together into a happy healthy team is your job. Many, many people have done this before, so the good news is that you can learn from them.

# How do you bring everyone together?

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DEB

Today specifically, you can learn from us. And then tomorrow you can make brand new mistakes that are all your own. First of all, take some time to look at the big picture; eg. your workflows and communication habits to make sure they're consistent and everyone has access to the information they need.

There are ways to set systems up that are usually better than what organically evolves.

You will, almost certainly, make mistakes. And that's ok,,but maybe let us help you make sure they're new mistakes?

What we won't be covering...



VME

The amount of ground to cover here, and we can't talk about all of the possible variables to good communication in mixed & distributed teams.

For instance, people often ask about tooling. Project management, real time chat, teleconferencing, etc. We won't be talking about those here.

We also won't cover the recruiting aspect of building these teams. Recruiting and hiring is a large topic which deserves a talk (or several) to itself.

So that's the conTEXT. Let's get to the conTENT.



Deb: A little work in advance can save you a lot of headaches down the road.

# Setting Expectations

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DEB - Saying what kind of communication you want may take the form of a Code of Conduct or it may be the way that you set ground rules for the meetings you run  
Try saying, "I won't tolerate name-calling in meetings. It's unproductive and mean."  
Or "I don't think Luke was finished" "I don't think Lisa was finished" over and over again until everyone in your meeting is glaring at your interrupters

## Modeling that Behavior



DEB - Say what kind of communication you expect and then model that.

If you want a "questions welcome" environment, then you need to respond to questions warmly.

You'll want to model asking non confrontational questions.

For example, "can you tell me a little more about how we got here?" is better than "what on earth were you thinking when you set this up?"

## Ears open



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DEB – You’re the boss, but you absolutely need input from your team. You want to make sure that you get input when you need it, without losing control of the conversation.

“Ears open” means people feel comfortable telling you when things are going poorly. You definitely want people to keep you in the loop.

If you give your team good parameters and have meetings that don’t suck, then you’re likely to get good actionable information.

## Inclusive conversations



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You're working with great people, so make sure they each can have their voice heard.

Collaboration doesn't spring from excluding people, accidentally or otherwise.

So, how can you make sure everyone is included in the discussions?

For starters, **ONLINE-ONLY** conversations and operations should be the default. If even one person isn't in the office, everyone should be dialing in, teleconferencing from their desk, and holding discussions in the chatroom.

Keep it out of meatspace



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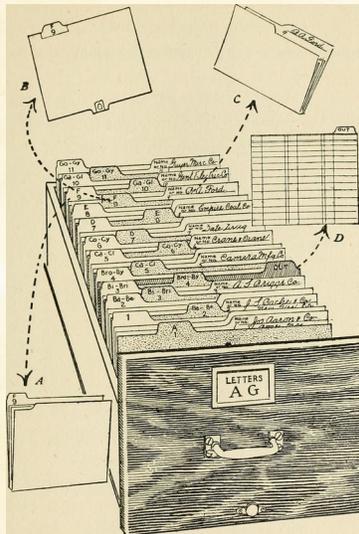
When collaborating with a distributed team, all conversations should occur online where everyone can see & participate in them

If conversations start offline, build a culture of awareness which enables people to move them online

All offline conversations should at least be captured and made available online in some way.

These are distributed teams. Not everyone will be available all the time because timezones are a thing. Make it possible for people to catch up on what they miss.

Notes of all meetings, discussions, decisions



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This means you should have a reliable method for capturing, storing, publishing, and sharing notes for all meetings, discussions, & decisions

Wiki, Confluence, issue tracker, document repository, whatever. Again, we're not going to talk about tools in this presentation.

Just make it easy to use, easy to search, easy to update, and open for all team members to use. Invest the time needed to select the right tool for the right reasons.

Discussions and notes aren't the only thing you should be sharing, though... (hand to Deb)

Share the overall goal



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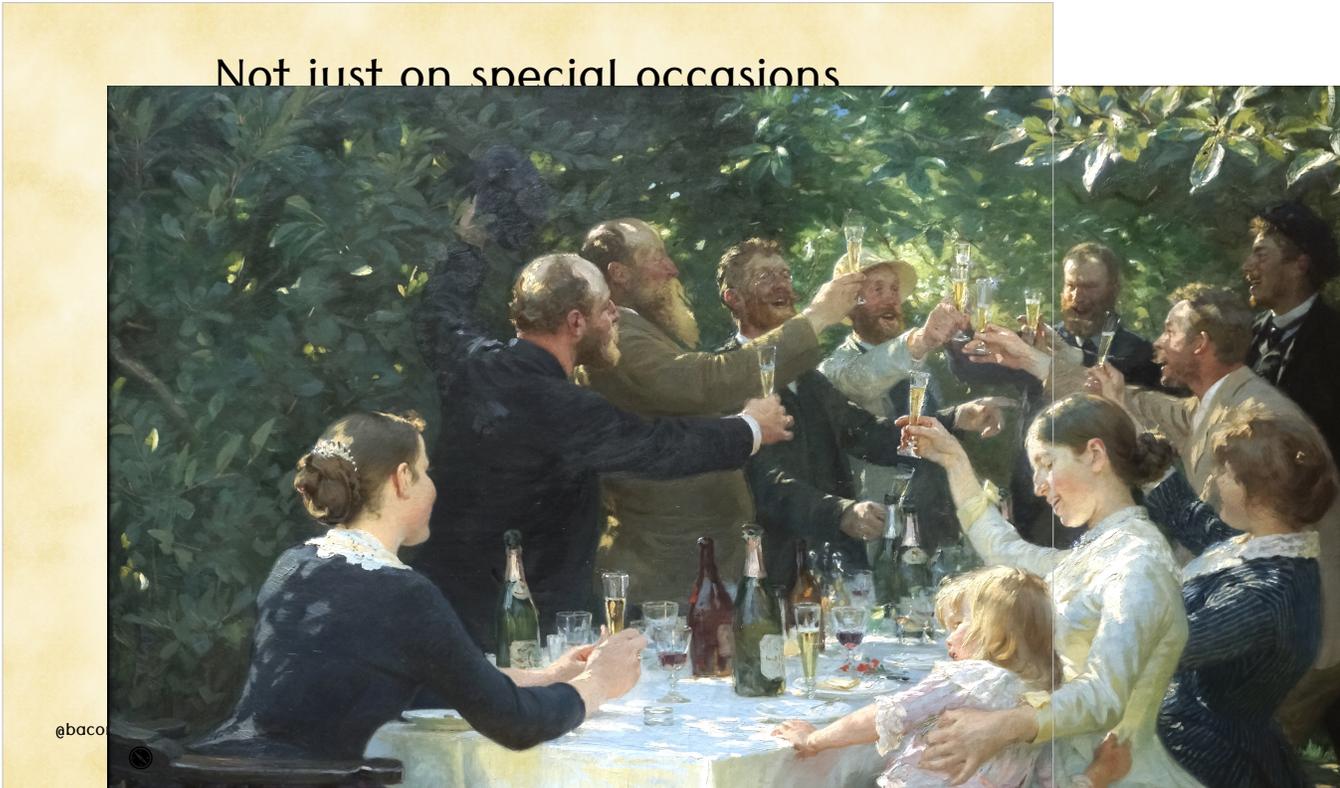
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DEB - Share your vision with everyone explicitly,  
"We're working to build the world's most accessible  
desktop, whatever it costs."

Or if money or getting bought is your goal, share that  
too. It shows respect and you'll get better day-to-day  
decisions from your people when they know why  
they're doing what they're doing.

Then share your vision often and draw connections  
between your lofty goals and your day-to-day  
"Thanks so much for getting video captioning working,  
that's a huge step for us being able to provide a  
complete system for hearing impaired users"

Not just on special occasions



DEB – Don't save it for just big wins or landmarks!

"Thanks to our recruiters and the senior web devs for all their great work onboarding our new junior folks these past two months. With greater capacity we're really going to be able to start closing on some of the features we want to add this year."

Or when volunteers have done something tedious you might say, "I know moving all that stuff over from the old database was not the most fun work of all time but it's critical to getting people switched over to the next release which is really going to help us appeal to more users."



VMB

OK, that's a bunch about communication routes and information, but what about communicatING? What about the actual conversation and collaboration?

People are complicated; teams of them are more so. What can you, as a leader, do to help your team be as effective as possible?

Make meetings productive



VMB

Most folks in the room  
cause: most of the time  
doesn't have a purpose

Meetings fail for the same reason a lot of other things do: We don't put enough thought into them in advance; we just dive in without looking first.

With preparation and forethought, meetings can be useful AND they can be more infrequent.

How do you do that?

Know why you're meeting in the first place

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For starters, know why you're meeting in the first place.

Meetings are a chance for people to discuss things in real time. Ask yourself...does this issue require that? Could it instead be handled via a conversation in email or your issue tracker?

This is a distributed team of diverse people with diverse needs in diverse time zones. Don't inconvenience them and break up their productivity if you don't need to.

That said, don't avoid a meeting if having one will legitimately help.

## Set meeting context/agenda



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YOU know why a meeting is needed, but do the invitees? Respect their time and tell them why they're meeting and what you hope to accomplish.

You should never send a meeting invite which doesn't include a detailed list of what will be covered. Ideally, list items should be in the form of a question, or otherwise be very clearly stated and closed-ended.

Also, include links to documents or conversations which are relevant to the meeting so people can be prepared with the necessary information and context.

Invite/include the correct people



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While we're talking about helpful things to do for invitees...  
how about not inviting them at all?

We don't like offending people, so we fall into the habit of  
inviting people who don't actually have to be at that  
meeting.

This can be caused by a poorly focused meeting (no agenda,  
so who knows who really needs to be there?) but also by  
insecurity: people feeling they don't have the chance to be  
respected and heard if they're not in every meeting.

We'll discuss the "being heard" thing later on, but for now  
please scope your meeting and invite only those folks who  
can help with that scope. Let everyone else keep focusing  
on their tasks.

(HAND OFF TO DEB)

Make sure the meeting goes well

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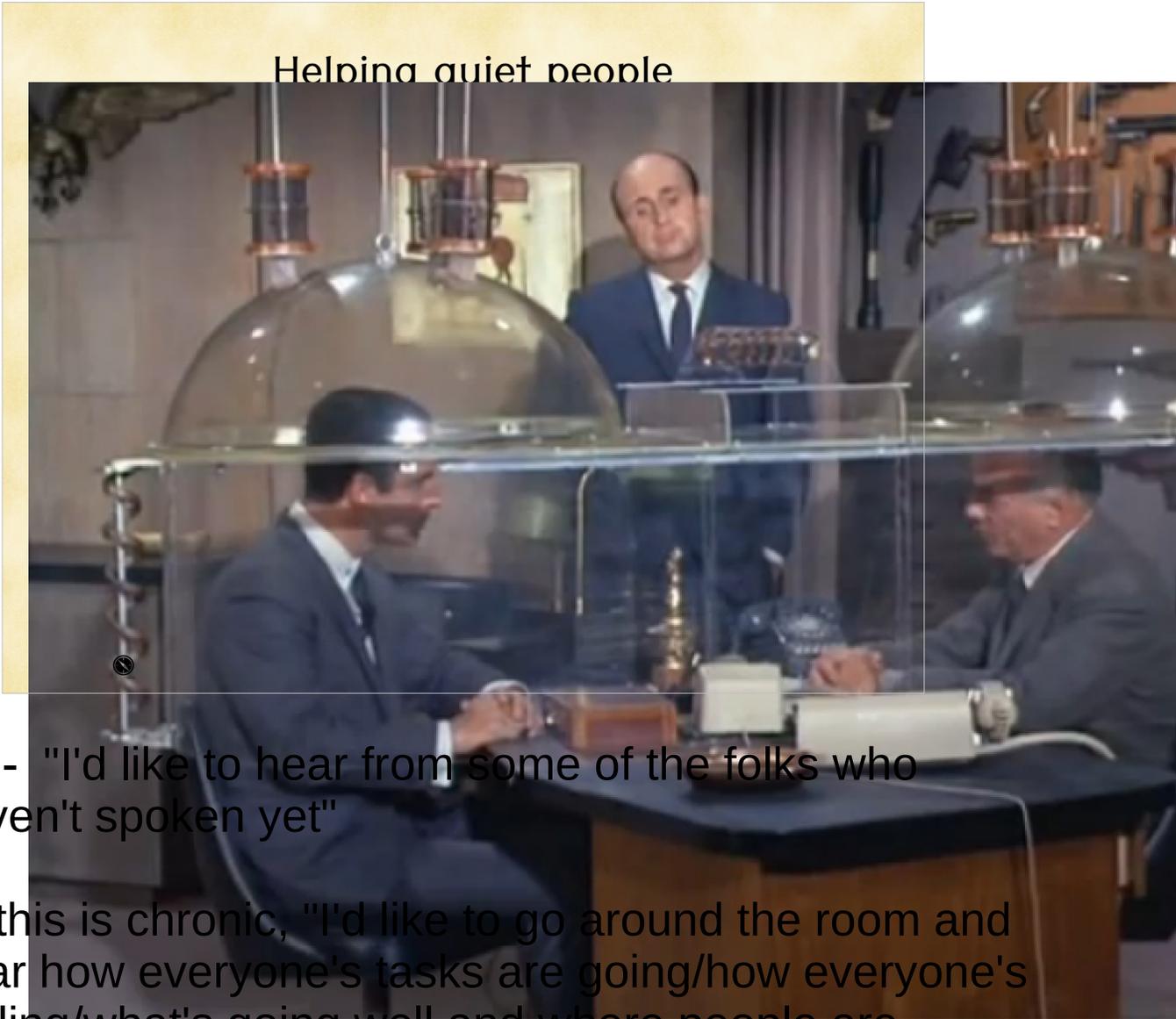
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DEB – If you set consistent expectations for the format, tone and expected behaviors – including follow-through – then people will get used to having lovely, helpful and productive meetings.

Be the narrator in meetings. “We’re at the halfway point, so we really have to move on.”

Or, “Great, Alice I have you assigned to that task and you’ll report back on it at the next meeting?”

## Helping quiet people



DEB - "I'd like to hear from some of the folks who haven't spoken yet"

Or if this is chronic, "I'd like to go around the room and hear how everyone's tasks are going/how everyone's feeling/what's going well and where people are struggling."

## Handling over-talkers



DEB - "I'd like to hear from Lucy, then Jessica" or "I don't think Colin was finished."

You may have to interrupt the interrupter and that may feel weird at first.

Be careful, because eventually it might not feel weird and then you'll have to learn to use your newfound comfort with interrupting... sparingly.

## Transparency: Follow-up and Deliverables

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DEB - Always put a name next to a task in your minutes and if it is time-sensitive, say when it will be finished by. Share minutes immediately – or even better take notes collaboratively in a pad or wiki.

Esp. if it's a long meeting, pull out all the TODO's into a "TODO" section at the top or bottom of your notes. or tag them with something like XXX. Choose any way you like, but be consistent.

## Table items which aren't on the agenda

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DEB - items which come up but aren't on the agenda will eat up your meetings. They also tend to become an opportunity for people to share opinions on things they haven't researched or thought deeply about.

Try, "That's interesting, but it isn't on today's agenda."

Or, "Last week we decided that we'd go with NoSQL, so the database choice isn't up for discussion again."

## Assign to a sub-group



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DEB - If it's not totally off-topic but doesn't need the whole group's input,

Try "If Asheesh and Jan are willing to look into that, then I'd love to hear about it at next week's meeting."

If it's something one, two or three people can handle, "Lin, could you and Tom take that up after the meeting and then let us know what you decided at our next meeting or via email?"



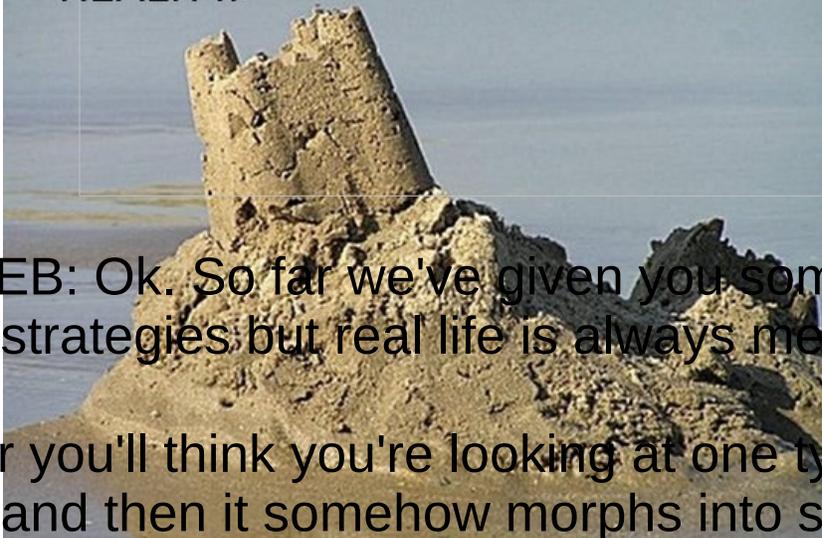
DEB (notes on next slide)

EXPECTATIONS:



Don't be  
perfect  
(that's OK)

REALITY:



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DEB: Ok. So far we've given you some general strategies but real life is always messier

Or you'll think you're looking at one type of situation and then it somehow morphs into something else

Or despite your best efforts to set a positive tone, someone has made another person feel bad or unappreciated

Or your attempt at keeping things light, made you sound like a jerk. It happens. And you'll have to figure out how to go into the messy part and fix things.



VMB

One thing which happens often is someone will just sort of disappear. They won't speak in meetings. They won't participate in chats, emails, or issues. Why does this happen?

Low confidence

Uncomfortable sharing their thoughts

Sometimes guilt over performance (real or self-diagnosed)

But sometimes they go radio silent because they just can't get a word in edgewise (< transition to Deb's next slide)

# Unhelpful Communication

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DEB – How do you deal with it? Let's see!

## Off-topic



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DEB - "While fascinating, the new Star Trek is really more of a lunch convo."

Or "That sounds a lot like a great topic for our off-topic or watercooler channel." Oh, you don't have an off-topic or watercooler channel? You might want one.

Or some other place or time when people can talk about Star Trek or puppies or someone's adorable new baby. Even an email thread that is clearly marked so those who don't care can avoid it

"Subject: Fantasy football? Body: email me off-list" Just keep in mind that if people are using project resources or listserves, these activities should still adhere to your CoC



DEB – Won't yield floor. You might need to encourage them to chair a smaller meeting where the details of the endless topic can be discussed and then have them share the results with the larger group in writing. Then the rest of group has an opportunity to ask questions and/or vote on the recommendations if appropriate.

If it's just endless talking that doesn't need to be discussed anywhere? "I'm going to have to ask you to wrap this up, since I'm committed to finishing our meeting on time."

Or for non-agenda items, "I can't have brand new topics introduced during the meeting. It isn't fair to everyone for whom this is a surprise topic. Please send me things in advance and ask for them to be put on the agenda."

Won't accept group decisions



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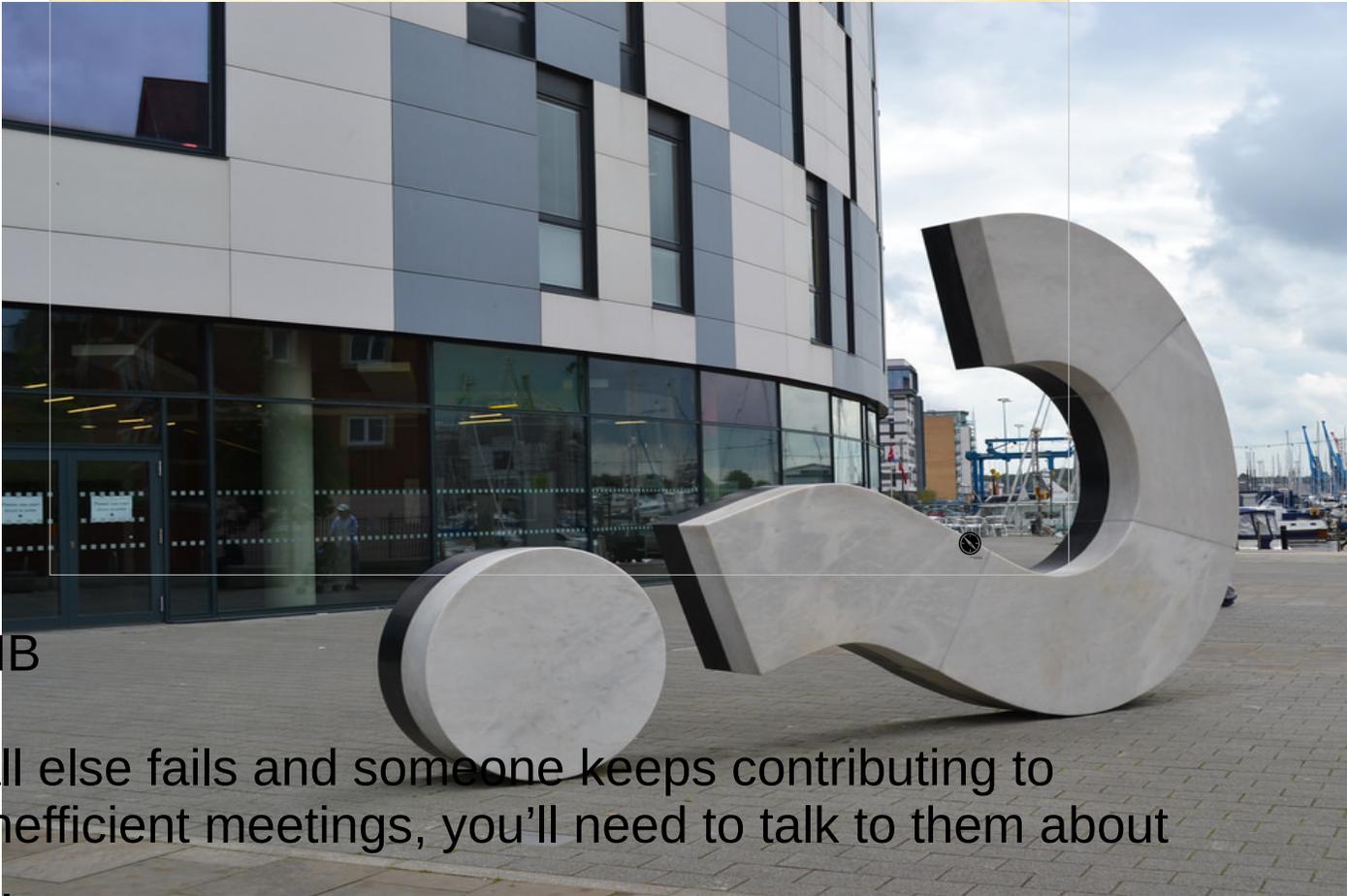
DEB – You have to shut this down, politely but firmly. It is extremely disrespectful to the group and wastes everyone's time.

"I'm looking back at last week's minutes... and we definitely voted to do the thing."

"I appreciate your concerns, but we are trying this strategy. It's possible that we'll revisit your concerns after we've actually tried it, but not before."

"Our timeline precludes us from spending any more time on a decision that the group has already made."

## Just Ask



VMB

If all else fails and someone keeps contributing to inefficient meetings, you'll need to talk to them about it.

Explain the issue to them and why it's a problem for the team, then **ASK THEM** for their perspective. Do not assume you know what's going on.

There are two sides to every story. Be empathetic and try to understand why this person has taken the actions they have. Only then can you really solve any problems.

## 1:1 chat



VMB

This conversation should not be held in public with the rest of the team. You want the other person to feel comfortable sharing their thoughts, not feel persecuted.

It should be 1:1, it should be private, and it should be in real time if at all possible. Face to face, teleconference, phone call. Build empathy and understanding through real time conversation.

Give the other person the chance to express themselves. Listen more than you speak.

## Change the venue/context



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## VMB

Changing the venue & context can help loosen up the conversation.

Take them to lunch. Go for a walk (even if it's a phone call). Have that video chat if you normally only do voice.

Even small changes in routine can help people feel more free to talk. And, if you're removed from your own comfort zone, you may be less likely to fall back on authority rather than taking the time to understand.

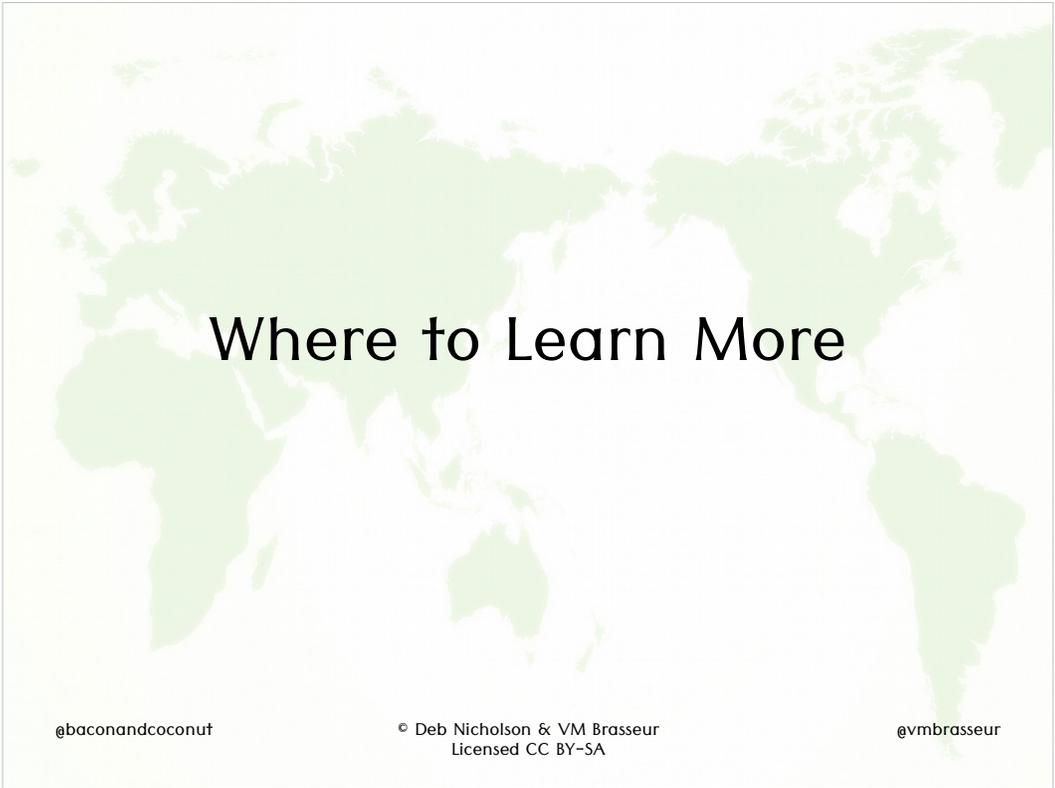
Sometimes, you may be the problem



VMB intro:

Related to that...your very first question when a communication problem arises should always be, "Am I the problem here? Could I do something differently or better?"

Before you start raking someone else over the coals and pointing fingers, review all of those notes you've been keeping. Did you say something (or NOT say something) which could be misconstrued? Judge yourself before you judge others.



# Where to Learn More

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## Resources

[https://www.zotero.org/groups/1787739/orienteering\\_for\\_managers/items](https://www.zotero.org/groups/1787739/orienteering_for_managers/items)

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Recommended books and articles at this bibliography.

Don't forget, these slides are available, so if you don't get this URL now you can always get it from the slides. We'll show you the slide URL again in a bit.

So, yeah, lots of books and articles here, but they're not the only place to get support and help learning how to do this stuff... (transition to Deb)



DEB: So....we wish you well on your journey.

However, we won't always be available to you. And sadly, your managees... your former buddies even, can't help you with your new managerial woes.

There is nothing more destructive to a team than having one group of people seem like the manager's best buddies, while the rest of the team feels like the "people who are talked about or laughed at."

Consider finding a fellow mgr to soundboard with. Maybe from a different workplace or even a different field who you can share anonymized challenges and gripes with.

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The slides are already available at Internet Archive, both with and without speaker notes.

XXX: Put this URL on the Questions slide instead?

# Questions?

<https://archive.org/details/velocitynyc2017-orienteing>



One more slide after this...

The Meet the Experts slide!

Still have questions?

Join us in the O'Reilly booth for  
MEET THE EXPERTS!

3:05 – 3:50 PM

Today

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