HOW TO IMPLEMENT PuMP VIRTUALLY

Implement PuMP through 100% online interaction that is more collaborative, productive, and engaging than in-person meetings!

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A message from author, Stacey Barr.

I've been speaking, training, facilitating and coaching online for about 17 years. There is a lot I've learned about both the technical and social side of delivering online, and this how-to kit is heavily based on what I've learned.

It's not as simple as finding an online meeting platform and going for it. If you want rich interaction, high productivity and deep engagement, you have to carefully design your approach to working online.

It's critical to think of each specific dimension of the virtual working experience, including these:

- The number and sequence of sessions you need to complete the project.
- How long people can stay energised and focused in online meetings.
- Which online meeting tools work best, and features and functions you'll need.
- How to structure each online meeting, to maintain focus.
- How to keep interaction and engagement high in online meetings.
- How to manage collaboration to productively produce the intended outputs.
- What should happen before and after the live online meetings.
- Where to keep the digital resources used and created throughout the project.

This How-to Kit gives you a practical guide for designing and delivering successful PuMP implementations, 100% virtually. No matter your reason for deciding on virtual implementation, I wouldn't be surprised if you find it works even better than in-person!

Smiles,
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Why? Explore the power of working virtually.

There are several reasons why working virtually can be the best option for a project implementation, like a PuMP Pilot or full PuMP implementation with a team:

1. The geographical spread of your team makes in-person meetings impractical.
2. Team members are busy and can only spare short bursts of time.
3. You have tight timeframes and need to move fast and not waste any time.
4. Team members work from home, or are part-time, and not often in the office.
5. Team members are too shy or intimidated to participate in person.
6. Crises, like COVID-19, restrict the ability to travel or work in groups.

Or perhaps you're curious to see if working virtually turns out to be more productive, focused and manageable than traditional meetings and workshops. Good for you!

Why PuMP?

When you're working virtually, the process you follow is quite important. You can't make it up as you go. You need to structure each online session carefully, and that's so much easier when you have a pre-designed process to follow.

My team and I have been delivering PuMP training, coaching and facilitating online for many years, and we know it works. It's easy to set the scope and content of each online meeting, and with the PuMP templates, it's easy to keep everyone focused and collaborating for the whole time they're online together.

If you've already learned PuMP, you'll understand what I mean. And you already have the resources you need to design and facilitate the implementation of each PuMP step with your team.

If haven't learned PuMP yet, start by getting an overview of PuMP, here: https://staceybarr.com/about/pump. Shortly in this How-to Kit I will give you options (including a free option) to learn PuMP sufficiently to be able to implement with your team, online.

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What about the social connection?

Social connection is fundamentally about each individual feeling as though they belong to the group, which is your PuMP implementation team in this case. When we're in in-person meetings, it's natural for most people to connect with each other through conversation, body language and even the sharing of 'tea and biscuits' or 'coffee and cake'. It's important.

How much social connection we need when we're implementing work projects is a hard question to answer, and it will vary depending on the personality types and existing relationships among your team members. But enough social connection will help lubricate the collaboration, productivity and engagement of your team.

Just because your PuMP implementation will be virtual, doesn't mean social connection cannot be facilitated. Here are tactics I've tried, plus a few more:

- ☐ At the start of each online meeting, help people feel seen and acknowledged by welcoming them by name, and asking them each to check in with some news or what they've just been up to.

- ☐ Share a few personal images of something current or personally important e.g. I used a photo of my dog Hinda at the start of a webcast to let people know if they heard any weird noises, it was her, snoring on the couch in my office.

- ☐ Throughout the online meeting, use people's names, often.

- ☐ Invite quiet team members for their input if they've been silent for a while.

- ☐ Don't just ask what the team what they 'think' about an idea; also ask them how they 'feel' about it, or what they 'imagine' it to mean.

- ☐ Allow some time at the end of each online meeting for everyone to reflect on how it went, what they thought went well, what could go better next time, and generally how happy or satisfied they were with their experience.

- ☐ Spend some one-to-one time with each team member, like over the phone, during the extent of the PuMP implementation, to give everyone a chance to safely air their thoughts and feelings.

- ☐ Create a space online for your team members to connect with each other, to ask for help or offer help, to throw ideas around, and get to know each other better.

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How? Follow a methodology and trust it.

The methodology needs specific features.

Don't try a performance measure implementation without a reputable source of how-to information. The process you follow needs to have a few qualities to elevate the online experience:

- ☐ **Logical**, a series of ordered and naturally sequential steps
- ☐ **Practical**, coded into techniques that pace you through bite-sized tasks
- ☐ **Documentable**, capturing all your thinking and decisions in clear templates
- ☐ **Novel**, encouraging different but fresh perspectives on developing measures
- ☐ **Engaging**, driven by specific questions that invite everyone's input
- ☐ **Proven**, supported by lots of case studies and examples

PuMP has all these features. It might not be the only methodology that has all these features, but it's the only one we know of, so far.

Choose your source of PuMP know-how.

There are several ways to get enough PuMP know-how to make your virtual implementation many times easier to manage, and many times more likely to succeed:

- Your PuMP Blueprint Workshop workbook and templates download
- A free copy of *Practical Performance Measurement*, which also provides a link to download the templates
- The self-paced PuMP Online Program, which includes activity instructions, templates and other useful downloads
- NEW: The PuMP Online Immersion Program, which includes all of the above, in a program that also provides live demonstrations and coaching as you implement with your team, along the way

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Who? Form your Measures Team.

A Measures Team is what we call the small and dedicated team that will take a set of their goals through the PuMP methodology, to measure and achieve them.

The ideal composition of a virtual Measures Team.

In a typical in-person implementation of PuMP, we look for the following qualities among the members of our Measures Team:

- ☐ A team leader, who has PuMP know-how (from one of the methods on page 7).
- ☐ A few people who work in the business function, process or team for which you are developing measures.
- ☐ The leader of the business function, process or team for which you are developing measures.
- ☐ At least one person who has numerical skills and a knowledge of the scope and methods of data collected within the business function, process or team.

For online Measures Teams, some additional qualities are useful:

- At least one member with knowledge in using the chosen online tools (more of these later), like the meeting platform and document sharing space.
- All team members have access to the chosen online tools, not matter where they are based (more on this later, too).

The ideal size for a virtual Measures Team.

I've certainly found that the more people you have in a group, whether it's online or in-person, greatly affects productivity, engagement and energy. That's why we advise the size for any PuMP implementation team to be between 4 and 7 people.

This still works well for virtual Measures Teams, too. There's no need to modify the number just because you're going online.

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What? Choose the right online tools.

For a 100% virtual implementation of a project, we need all the resources and interaction and outputs of the project to be available to every team member, online.

OBLIGATORY WARNING: I'm going to give you examples of tools throughout this section, but please note I haven't personally tested them all, nor do I vouch for how well they work. It will be your responsibility to research and select tools that will work in your organisation. The examples are just to illustrate the points I'm making.

The purpose served by traditional offline tools.

One way to think about the scope of online tools you'll need for a virtual PuMP implementation is to consider what purpose the traditional tools for in-person implementation serve:

- Meeting rooms make it possible for people to collaborate at the same time on the same task and are particularly ideal for when ideas need to be understood and decisions need to be made.

- Data projectors and screens make it possible for the team to all focus on the same thing and see instant progress on what they are discussing or creating.

- Flipcharts and whiteboards make it possible for the team to explore ideas before making decisions, to capture the outputs of their task at hand, or to capture ideas that aren't directly relevant to the task at hand.

- Physical files and folders make it possible to keep a growing record of the outputs created as the project progresses.

- Catering is not only a way to keep people energised while they work, and to produce more by removing the distraction of long breaks, but it's a way to help people feel appreciated and socially connected.

For a 100% virtual implementation of PuMP, all these traditional physical tools need to be replaced by online alternatives.

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Replace the offline tools with online tools.

There isn't a one-to-one online version of those offline tools, however. It's the combination of features they provide that matters. For a 100% virtual implementation of PuMP, for example, you'll need tools that collectively help the team to:

- ☐ Collaborate, to get the team members together to do the work of each step in PuMP, via their computers, from wherever they happen to be.

- ☐ Capture, so team members can access all the outputs they are creating, such as completed PuMP templates, performance reports, data and so on.

- ☐ Coordinate, to keep team members informed on the progress of the project, which PuMP step they are up to, what's going to happen next, what actions need to be done.

- ☐ Connect, to provide team members with a way to converse outside of the whole-group sessions, to continue work in between those sessions, share progress, and ask for and give help to one another. In PuMP specifically, this is important for how the Measure Gallery will be run.

- ☐ Celebrate, so team members can enjoy the progress they are making, as individuals and as a team.[1]

Without pretending to be comprehensive, here are some suggestions for the kinds of tools that can replace each of these traditional offline implementation tools…

Collaboration tools

Collaboration tools allow multiple people to get together at the same time, to be able to speak to each other, to share visuals (like someone's computer screen), and possibly to record the session. Examples include:

- ☐ Zoom
- ☐ GoToMeeting
- ☐ WebEx (Cisco)

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[1] Honestly, I didn't intend to create a list of words that started with the same letter; it just emerged, so I went with it.

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Capture tools

The first part of capturing the work your Measures Team is doing is to make sure you're using the PuMP templates. They capture not only the outputs, like the measures that were designed, but also the thinking that led to those outputs. And you'll need a shared space online to store those outputs, and possibly ongoing versions of each output, like these:

☐ Microsoft Office 365

☐ Asana

☐ Slack

Coordinate tools

The online versions of tools to coordinate a virtual PuMP implementation are likely the same tools you'd use to coordinate an in-person one. In addition to the obvious email, it will be online project management software that all team members have access to, like these:

☐ Asana (my team and I use this one)

☐ Trello

☐ OpenProject

Connect tools

Ideally, the tool you choose for capturing your PuMP implementation outputs will also provide a way for team members to connect and chat online about the project. It will keep all contributions in one place. But some other examples include:

☐ Slack

☐ LinkedIn unlisted (private) group

☐ Facebook Workplace

Celebrate tools

Celebration is important for motivation. It's a process for helping team members appreciate the value of what they're creating and learning. You can go nuts with ideas for making virtual celebration possible, but a few examples are:

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☐ Express gratitude, where team members openly share something or someone that they're grateful for in being part of the Measures Team.

☐ Share visual progress, like a simple chart of ticking off each PuMP step completed so far, or each project milestone reached, and congratulating the team on making such progress.

☐ Send surprise gifts in the post, even thought it might not be part of the 'online' theme, like a relevant book, some chocolate, or even just a card (okay, it can be an e-card if you want) that says a heartfelt 'thank you'.

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Where? Well, it doesn't really matter.

The whole idea of running a virtual PuMP implementation is that all of your Measures Team members can be anywhere. Anywhere in the world, almost. They might be:

- Working from home.
- On a working vacation in Bali.
- In any of the 17 cities that your organisation has offices in.

Where they are is probably far less important than the setting in which they're in.

What matters is the setting where each team member is.

This might influence the composition of your Measures Team members, because the setting in which they participate from needs to meet a few conditions to work well:

- ☐ The time zone they're in lines up with everyone else, and no one is expected to join meetings when they should be sleeping.
- ☐ Internet access needs to be reliable, so they aren't missing any of the team sessions or access to the team's outputs.
- ☐ Their equipment needs to be at the very least a computer, with speakers and a microphone so they can participate in live sessions.
- ☐ A quiet space where they can focus without too many distractions, like demanding children, busy workplaces, crowded public spaces or loud machinery.

Every situation will be different and unique, so the above points are provided more as prompts to check with each Measures Team member, not as conditions for their participation in the team.

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When? Shorter and more frequent sessions.

Manage focus and energy.

Focusing online is harder than in person. Our attention, our eyes, our bodies are all locked into a much smaller space than in a meeting room. That's tiring.

Online sessions should really be no more than 90 minutes at a time. If you run them longer, you will need a reasonable break every 60 or 90 minutes. And even then, I would limit the total time to no more than 3 hours in a single day.

A few ways to break up the tight online focus could be:

☐ Limiting any one person from talking for more than 5 minutes at a time.

☐ Building in stretch breaks every 30 to 45 minutes, and even giving images or videos of stretches that a great to do to release desk-induced stress.

☐ Giving team members a 5-minute pauses to ponder a question and gather their thoughts, maybe by getting up and walking around the space they're in, before having everyone share their responses.

☐ After 60 or 90 minutes, let everyone take a 15-minute break and encourage them to stretch, walk, make a cup of tea or coffee or water, or go outside for some deep breathing and setting their gaze on the horizon.

Let work continue after online meetings.

If you don't get all of your goals through the PuMP Measurability Tests or Measure Design or you don't finish all the Measure Definitions in the designated online meeting, that's fine. Often the 90-minute meeting is plenty to get everyone into the flow of the PuMP technique in focus. And it's enough time to work through a complete PuMP template for one goal or measure.

This means that the team can then continue to work on other goals and measures after the online meeting. They can collaborate online, in pairs or as a whole group, contributing content

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into more PuMP templates. You might only need to schedule another online meeting to make the final decisions on each template.

One or two online meetings per PuMP step.

So, for the most part, each PuMP step might only need one online meeting, followed by online collaboration using the templates. It will depend on the number of goals you're trying to measure, though. If your Measures Team has six goals to measure, it will probably need a couple of online meetings per PuMP step, compared to if they only had one or two goals (like in a PuMP Pilot).

As you get more practice with facilitating PuMP in online meetings, and your teams get more familiar and experienced with PuMP, you'll get more proficient, and you'll need less time.

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What else? Get the most out of PuMP.

Mix it up (the facilitation, not the PuMP steps).

No one enjoys monotony. And online meetings are at risk of feeling monotonous, unless you mix up the experience in different ways:

☐ Encourage concise input from everyone, but frequently e.g. you might actively invite input from every team member, one at a time, to balance the input from everyone and avoid anyone dominating.

☐ Invite team members to take on different roles throughout the online meeting e.g. one as presenter to lead the discussion, one to capture input in the PuMP template, one as checker to make sure PuMP is being implemented properly, one as group facilitator to make sure input and participant is balanced and constructive.

☐ Rotate the roles that team members take across the online meetings.

☐ Use photos to illustrate stories you tell, goals that you're measuring, to bring ideas to life in team members' minds.

☐ Have examples and metaphors on hand to help explain the different or new parts of PuMP to the team members.

☐ Switch up the pace during online meetings, e.g. encouraging speed for sharing ideas, slowing down a bit when thinking is needed.

☐ If it feels like the conversation is going around in circles, says so, and remind everyone of the 80% rule we use in PuMP: when it's 80% good enough, move on and let the next step make it better.

Use the PuMP templates for focus and engagement.

The templates will act like an agenda in your online meetings, keeping everyone focused on the task at hand. The way you use the PuMP templates can also boost engagement as well:

☐ Fill in the templates live, in a way everyone sees the progress, to keep the focus on one step at a time and build anticipation for the next step.

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☐ Capture what team members say, directly into the templates, using their words. This helps everyone 'see' what is being said, and no good ideas are lost. You just continue to edit the words as the conversation evolves, right in front of everyone's eyes.

☐ Don't filter or reword what team members contribute into the templates; start with their words and allow the group to ask questions, make suggestions and then agree on the next iteration or version of what should stay in the template.

☐ Not everything that's said will be relevant to the PuMP step you're working on. It can help greatly to have a separate document, a Parking Lot with a section for every PuMP step, where you can capture thoughts or concerns or questions that are important to deal with immediately.

What about the Measure Gallery?

The one step in PuMP where you involve people beyond your Measures Team members is the Measure Gallery. But it's not feasible to run the same kind of online meeting for dozens or even hundreds of your colleagues to engage with the measures your team has designed.

A virtual Measure Gallery needs a different dynamic, so lots of people can contribute in a way and at a time that's convenient for them. We don't have a single tried and true formula for running virtual Measure Galleries yet, but you can take a lot of inspiration and ideas from this case study: Building Buy-in to KPIs With Virtual Measure Galleries.

And keep practicing.

We don't master things the first time we try them. We don't master PuMP in our first implementation. We don't master online facilitation the first time we try it. Mastery comes with practice.

As the online tools available to us continue to develop and grow and improve, we can continue to hone and test and practice how they best support PuMP implementations.

As long as we keep engagement, productivity and collaboration in balance, we might just find that 100% virtual PuMP implementations can be the fastest and easiest way to create a high-performance culture, and get more people measuring what matters.

About Stacey Barr

Stacey Barr is a globally recognised specialist in organisational performance measurement. She discovered that the struggles with measuring business performance are, surprisingly, universal. The biggest include hard-to-measure goals, trivial or meaningless measures, and no buy-in from people to measure and improve what matters. The root cause is a set of bad habits that have become common practice.

Stacey created PuMP®, a uniquely methodical and practical performance measurement approach. PuMP replaces the bad KPI habits with techniques that end the common KPI struggles. PuMP makes measuring performance faster, easier, engaging, and meaningful.

Stacey is author of Practical Performance Measurement and Prove It!, publisher of the Measure Up blog, and her content appears on Harvard Business Review's website and in their acclaimed ManageMentor Program.

Discover more about Stacey and practical performance measurement at www.staceybarr.com.

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With a three-decade background that covers senior management, academia and consulting, Mark brings an insightful and pragmatic approach to organisations wanting to improve, to cast-off the industrial age ideas that no longer work, and adopt practices that are relevant for our current age and economy.

He has worked with almost one hundred different organisations and has delivered more than 200 client engagements. His experience and MBA are backed up with qualifications in PuMP®, Prosci Change Management and the Net Promoter Score®.

Mark was certified in PuMP® in 2007 and joined the PuMP® Partner team in 2013.

Mark offers public and in-house PuMP® Blueprint Workshops and also PuMP® consulting to support our customers in Australia, New Zealand and Asia Pacific.