

EBA Assessment and Growth Planning

Link to Support Center article on [How to Facilitate the EBA Assessment](#)

Duration

- 1/2 Day Workshop
- 240 Minutes Available
- 240 Minutes Represented in the Agenda

Outcomes

- Leadership Team completes an EBA Assessment for a selected Portfolio
- Identifies relative strengths and weaknesses across the EBA competencies
- Define Transformation Strategic Themes for the Next Year
- Understand the next steps for transformation planning

Pre-work

- Provide the participants with the EBA overview video or 2-hour EBA Seminar
- Education on terms and concepts that will be used in the session:
 - AgilityHealth
 - Strategic Themes
 - Growth Items
 - Measurable Outcomes (OKRs)
 - Definitions of the EBA pillars and competencies
- Provide an understanding of the EBA Transformation Process and how the assessment fits into the overall process

Agenda

1. Introductions & Meeting Purpose
2. Take the EBA Assessment
3. Break
4. Analysis and discussion of the results
5. Break
6. Identify Key Areas for Transformation – Next 12 Months (3 – 5 Strategic Themes)
7. Discuss Next Steps

Supplies

- Sticky Note Pads
- Sharpie Markers
- Flip Chart Markers
- Post It Flip Chart Pads (5)
- Easels (5)
- Survey Preview: <https://app.agilityhealthradar.com/assessment/10508/preview>

Room Organization

- 4 Tables of 5 – 6 people at each table
- Sticky Note pads and markers at each table

Facilitation Plan

1. Introductions (33 Mins)
 - a. Overview (2 Minutes)
 - i. Describe the purpose for the workshop & take questions
 - ii. Review the agenda
 - b. Introductions (3 Minutes)
 - i. Introduce ourselves
 - ii. Identify our roles as neutral facilitators
 - c. Meeting Norms (8 Minutes)
 - i. Ask participants to identify the behaviors, patterns and actions that cause meetings to go awry
 - ii. Capture and post meeting norms that will help ensure meeting success
 - iii. Watch the Conscious Leadership Group “Above the Line” video
 - d. Workshop: Drivers for Change (12 Minutes)
 - i. In small groups, consider the question “What are the top challenges you face at your company with transforming to the new ways of working?”
 - ii. Capture your ideas on Sticky Notes, one idea per sticky.
 - iii. Each group reviews their ideas and post them (resolving duplicates as we go)
 - e. Review the EBA Model (V2.0) (8 Minutes)
 - i. Define Business Agility
 1. “The ability to adapt to change, learn and pivot, deliver at speed, and thrive in a competitive market” – Evan Leybourn, Sally Elatta
 2. “... because, gone are the days when big eats small. Today fast is eating slow. The ability to learn and deliver faster than competitors may be the only sustainable competitive advantage”
 - ii. Describe each pillar in the EBA model using the EBA Radar Handout
 1. **Customer Seat at the Table:** Deeply understanding your customer and engaging them from start to finish. Creating a customer-focused culture where everyone sees their day to day jobs to be done from the lens of how it affects the customer.
 2. **Lean Portfolio Management:** Clarity on strategic intent & themes and alignment to outcomes at every level. Quarterly planning cadence focused on delivering outcomes over deliverables.
 3. **Org. Structure and Design:** Intentionally designing the structure or your organization to maximize agility. Alignment of all teams (business & technology) to accelerate the delivery of measurable outcomes.

4. **Agile Framework & Mindset:** Business agility depends upon a strong foundation in Lean and Agile thinking and adopting Lean/Agile values, principles, practices and frameworks.
 5. **Leadership & Culture:** Transforming leadership at all levels to create an environment that supports autonomous teams and a culture of business agility.
 6. **Make it Stick:** Ensuring the transformation to enterprise business agility becomes ingrained in the culture and continuously evolves over time.
 7. **Technology Agility:** Transforming the technology foundation, architecture, practices, culture and tools to enable delivery of faster and more reliable solutions to our customers.
 8. **Enterprise Agility Metrics:** Tracking and managing to Enterprise Agility Metrics: Enterprise Flow, Value, and Quality. Enterprise Flow is Speed to Market, throughput and efficiency. Enterprise Value is outcome delivery, customer satisfaction and benefit realization. Enterprise Quality is fitness for use, performance and reliability.
2. Take the EBA Assessment (45 Mins)
 - a. Review the EBA Assessment Preview covering the points for completing the assessment
 - i. Starting the Survey & Navigation Structure
 - ii. Maturity Model: Crawl, Walk, Run and Fly
 - iii. Valid Answers 1 – 10, how to choose your rating and when to use N/A
 - iv. Importance of Text Responses & providing an honest assessment
 - b. Scope of the Assessment
 - i. Consider the entire Portfolio as a whole
 - ii. Do not answer only for your particular area
 - c. Launch the Assessment using the link in the email you received
 3. Break (10 Minutes)
 4. Review Results Overview (10 Minutes)
 - a. Instruct them to find the email they received and use the link to sign-in or create an account to view the results of the assessment
 - b. Walk the group through how to navigate through the results (sections and features)
 5. Workshop: Results Analysis (60 Minutes [40 Mins Analysis / 20 Mins Read Out])
 - a. Break into 4 Teams, each team will be responsible for analyzing and presenting on 2 Pillars
 - b. Teams are as follows:
 - i. Team 1: Customer Seat at the Table & Enterprise Agility Metrics
 - ii. Team 2: Lean Portfolio Management & Org. Structure and Design
 - iii. Team 3: Agile Framework and Mindset & Technology Agility
 - iv. Team 4: Leadership and Culture & Make it Stick

- c. Each team captures ideas and talking points on sticky notes, one idea or item per sticky. The stickies are posted on 2 flip chart sheets (1 sheet per pillar). For each Pillar, the sticky notes are organized around the 3 competencies in that pillar.
 - i. Create and template of the output and walk through it as you go over the instructions
 - d. Each Team presents their observations and thoughts and fields questions from the rest of the teams
 - e. The sheets are posted at the front of the room
6. Workshop: Dot Voting (7 Minutes)
 - a. Everyone has 5 votes for the competencies that they think we should focus on in the next 12 months. Each person can apportion the votes however they want (multiple to 1 item or 1 vote per item or anything in between)
 - b. Silent Voting Technique
 - i. Everyone writes the names of the competencies they want to vote for on sticky notes. One competency per sticky. They write the number of votes they are putting on each sticky
 - ii. When everyone is ready, go post your votes next to the competencies on the Flip Charts at the front of the room
 - iii. Demonstrate for the group as you describe the technique
 - c. Add up the votes and identify the top 5 competencies to focus on in the next 12 months
7. Break (10 Mins)
8. Workshop: Strategic Themes (45 Mins)
 - a. Break into Teams around the top competencies
 - b. Each Team captures 3 to 5 measurable outcomes they expect to see for that competency after 12 months
 - c. Each Team writes an objective statement for those results
 - d. Each Team presents their Strategic Theme and captures feedback
9. Next Steps and Close the Meeting (20 Minutes)
 - a. Talking points from today's session – "What will we tell others about the time we spent today?"
 - b. Confidence Vote on the Value of the Session
 - c. Quick Retro – Feedback
 - d. Next Steps