



NEVER  
SETTLE  
 FOR  
GOOD  
ENOUGH

THE RETROSPECTIVE GUIDE

FIND  
CUSTOMER  
EXPERIENCE



BLINDSPOTS  
AND CREATE  
INNOVATIVE  
SOLUTIONS

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# THE RETROSPECTIVE PROCESS

## 1. Gather Your Data

Not only is this a critical first step, but it can also be very telling. The goal is to test how well your perspective compares to that of your customers. Through interviews and data collection, your team will start to identify the blind spots holding them back.

## 2. Review, Analyze, and Present

This is the most difficult part of the Retrospective because it calls for objectivity. While reviewing the feedback, your first objective is to identify trends. Then, analyze those trends through the lens of your product/team's mission statement. Identify the objectives you achieved and the areas in which you missed the mark. And remember, a false positive is just as dangerous as a false negative.

## 3. Reimagine

Based on insights your team has gathered from the data, generate ideas to improve your offering. If you had known what you do now from the beginning, what would you have done differently? Has the mission of your team/product morphed, or do corrections need to be made?

**DON'T BELIEVE  
EVERYTHING**



**YOU THINK**



# 1.0 PREDICTING SELF-ASSESSMENT

To kick things off, it's time to write down a few predictions on how you and your team *think* your project or initiative is doing. If you aren't using an objective third-party (more on this later) throughout this process, it's incredibly important to write down your predictions at the outset. Feel free to print out duplicates of this page and distribute to your team.

## WHAT PROBLEM ARE WE SOLVING FOR OUR CUSTOMERS?

## WHAT ARE OUR STRENGTHS AS A COMPANY/TEAM?

## WHAT ARE OUR WEAKNESSES AS A COMPANY/TEAM?



# 1.1 GATHERING CUSTOMER DATA

For this step, it's important to gather as much unbiased data as possible. You can use in-person interviews and online surveys. Regardless of what method of collection you use, stick to open-ended questions.

WHAT PROBLEM DO WE SOLVE FOR YOU?

WHAT ARE OUR STRENGTHS AS A COMPANY/TEAM?

WHAT ARE OUR WEAKNESSES AS A COMPANY/TEAM?



# 1.2 GATHERING CUSTOMER DATA

## PRODUCT

Determining if, and more importantly *how*, customers are using a product or initiative can be difficult. There will be obvious quantitative results, like sales and returns, but those figures will still leave blind spots. Go beyond the figures and gather qualitative customer feedback.

### QUALITATIVE

- Help/support requests
- Customer complaints
- Customer interviews
- User surveys
- Social media feedback
- Anonymous internal survey\*

### QUANTITATIVE

- Sales figures over time
- Customer demographics
- Overall industry performance
- Returned product/warranty figures
- Help/support requests
- Customer usage data

## SERVICE

When providing a service, you expect to understand customer needs because you interact with them. But, it's important to remember customers often say what they think you want to hear, rather than the truth. Because of this, seek both quantitative and alternative forms of qualitative data to gather additional insight.

### QUALITATIVE

- Help/support requests
- Customer interviews
- User surveys
- Social media feedback
- Inbound communication from customers
- Anonymous internal survey\*

### QUANTITATIVE

- Sales funnel break down
- Customer demographics
- Overall industry performance
- Customer retention figures
- Help/support requests
- Customer usage data

# 1.3 GATHERING CUSTOMER DATA

## PRODUCT/SERVICE:

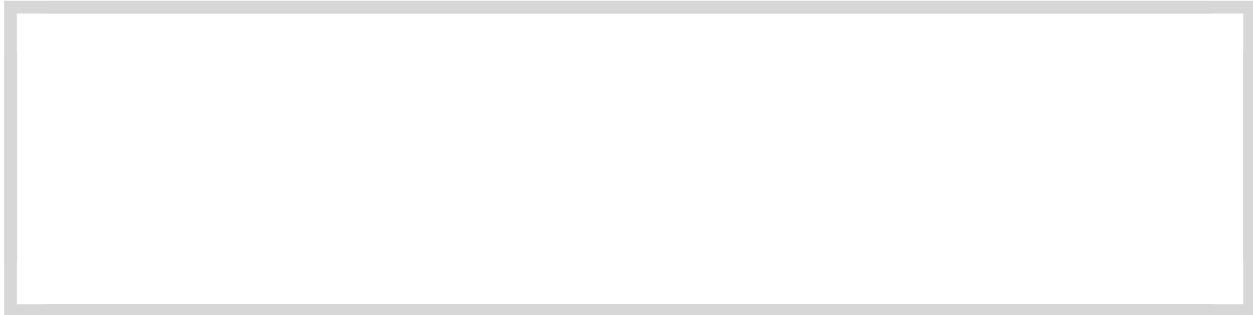
Name your initiative/product/service/project above, then decide on data collection points and assign to teams/team members.

QUALITATIVE		QUANTITATIVE	
DATA	OWNER	DATA	OWNER

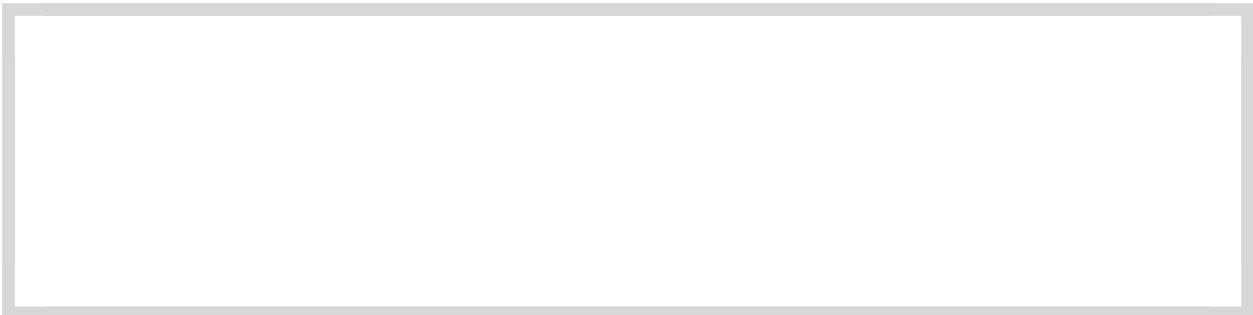
## 2.0 COMPARISON

Time to get real. Consolidate your team's answers and compare them to your customer's answers. Bring in an objective 3rd party to help you review the results. Someone who cares enough to help you but doesn't care enough that their personal ego will be wrapped up in the outcome.

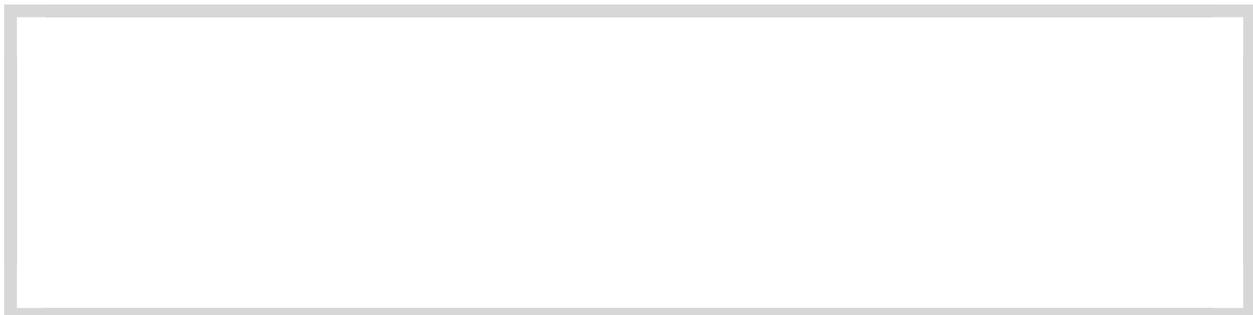
**WHAT VALUE DO OUR CUSTOMERS SEE THAT WE DON'T?**

A large, empty rectangular box with a light gray border, intended for handwritten notes or answers to the question above.

**DO WE SEE THE SAME STRENGTHS AS OUR CUSTOMERS?**

A large, empty rectangular box with a light gray border, intended for handwritten notes or answers to the question above.

**WHAT ARE OUR WEAKNESSES?**

A large, empty rectangular box with a light gray border, intended for handwritten notes or answers to the question above.

## 2.1 USING AN UNBIASED OUTSIDE SOURCE

If you've ever told a new mother that her baby was ugly, then you can skip this section, because you are ruthless in objective assessment. For the rest of you decent people, being unbiased is difficult. It's tricky to shift your perspective from inside a project to the outside without clinging to intention or knowledge of the effort applied. Alternatively, you may be tempted to overcompensate, leading to over-scrutinization. See? Tricky.

Because of this, we recommend asking an outside source to review your data. We've said it before, but it's worth the attention. Find an unbiased individual. Someone who has invested little to nothing in your project/product. The less skin in the game, the less bias they'll share.

### DIG DEEPER - BLINDSPOT INDICATOR

Our goal is to increase our area of self-awareness and reduce our blindspots. And the only way to do that is to solicit the truth. 

List out characteristics you believe to be true about yourself in the first box. These are terms you confidently believe describe you. Then ask your unbiased outside source, or someone close to you who knows you in the right capacity, which of those terms they would use to describe you and then if there are any additional terms that are not on this list that they would use to describe your product or service offering.

Those additional terms? Those are your blind spots. Those are the things your customers see that you don't.



## 2.2 PREPARE AND PRESENT

It's time to prepare your Retrospective meeting. Schedule at least a half day to present and reflect on your findings. Each data source should receive a portion of the time and the team who collected the data should report not just their findings, but their analysis on what the data means.

It's helpful to frame the findings in terms of your team's goals. If your goals are to Provide Value Everyday and Put the Customer First, frame the data around those goals. According to the data, did we accomplish those goals?

When possible, prepare the data in handout form to allow participants to focus on questions and dialogue and reduce note taking.

### AGENDA



#### Presentation of Rules

Start the morning with clear expectations for the day. Lay out the schedule of presentations and discuss the Retrospective rules.

#### Values Based Kick-Off

Fearless leaders, it's time for you to step up and set the tone for the day. Remind your team why you're here and the importance of taking the time to reflect. Spend some time revising your values and goals as a team. Get the energy in the room flowing.

#### Qualitative Presentations

Numbers first! Encourage all members of the team to reflect on the data, especially those who are normally data-averse.

#### Quantitative Presenter

Bring in the customer voice here. Direct quotes, word clouds, and interviews are powerful presentation tools.



# RETROSPECTIVE RULES

## 1. SHOW UP ON TIME AND COME PREPARED

Be prompt in arriving at the Retrospective and in returning from breaks. Stay mentally and physically present.

## 2. LISTEN WITH AN OPEN MIND

Value the learning from different inputs and listen to get smarter. You can respect another person's point of view without agreeing with them. Be patient when listening to others speak and do not interrupt them.

## 3. SHARE YOUR PERSPECTIVE

Your voice is really important in this process. Please share your opinion even if someone has already expressed something similar.

## 4. ATTACK THE PROBLEM, NOT THE PERSON

Respectfully challenge the idea, not the person. Honest and constructive discussions are necessary to get the best results.

The speed of innovation is directly related to your speed of learning.

If you aren't reflecting on & documenting failures

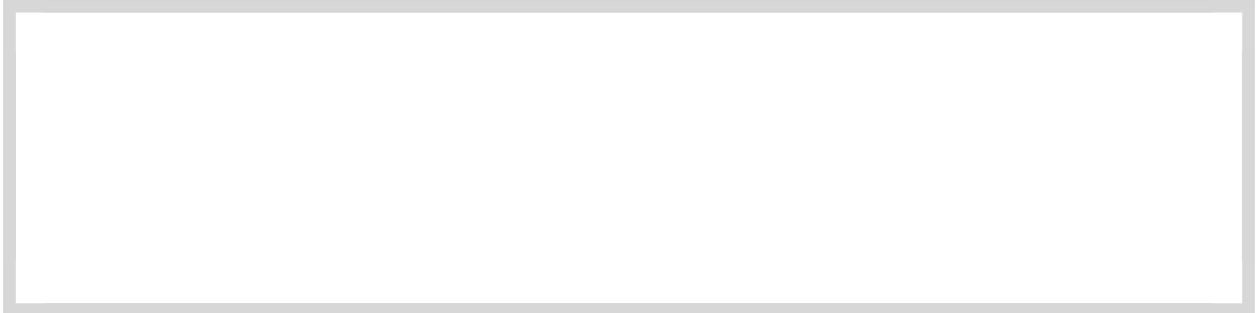
**YOU AREN'T GROWING**



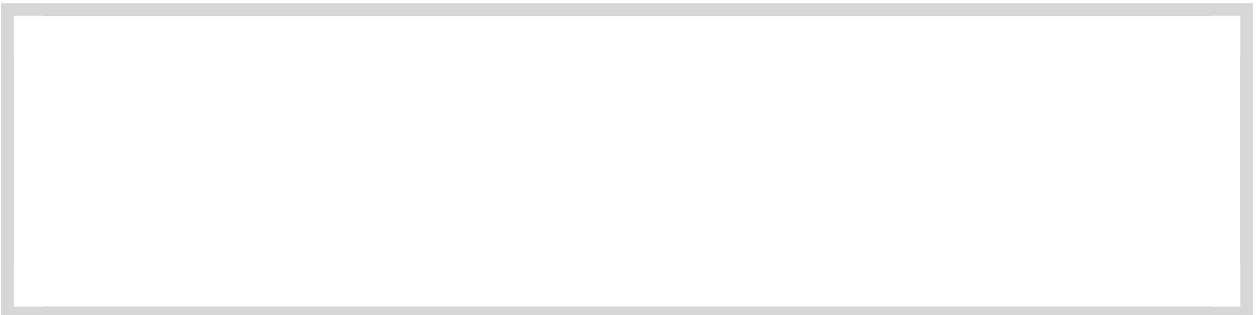
## 3.0 REIMAGINE

This is where your team's creative and technical skill sets can truly shine. Give your team time to answer the following questions:

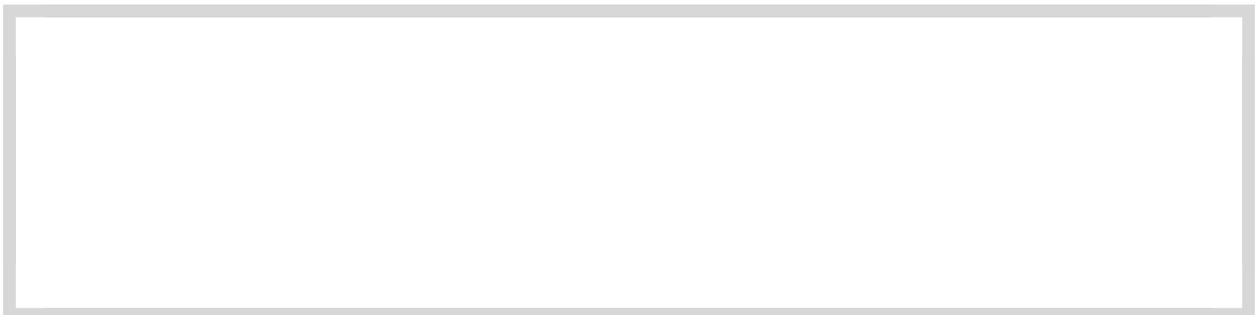
IF WE COULD START OVER, WHAT WOULD WE BUILD, KNOWING WHAT WE KNOW NOW?

A large, empty rectangular box with a light gray border, intended for a team's response to the question about starting over.

WHERE DID OUR ASSUMPTIONS FALL SHORT?

A large, empty rectangular box with a light gray border, intended for a team's response to the question about assumptions.

HOW CAN WE PREVENT BLINDSPOTS IN THE FUTURE?

A large, empty rectangular box with a light gray border, intended for a team's response to the question about preventing blindspots.

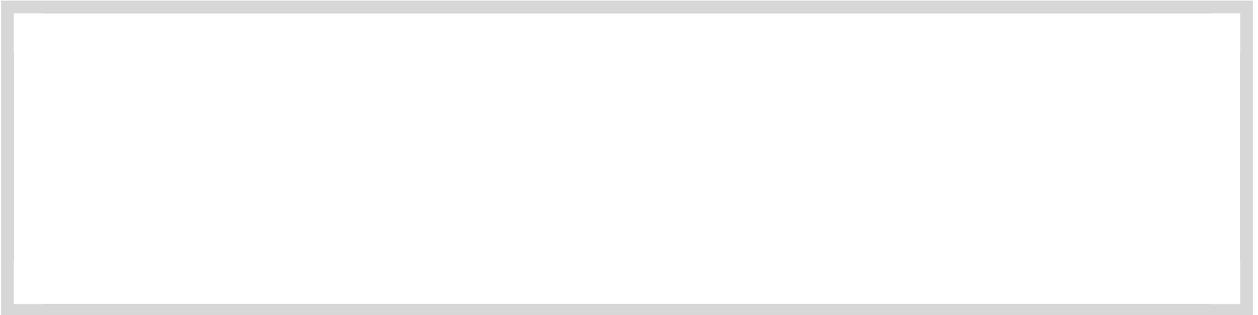
## 3.1 REIMAGINE AND ACT

Time to take action. Assign responsibilities to each team member and create deadlines.

**WHAT CHANGES DO WE NEED TO MAKE? WHO WILL MAKE THEM?**



**HOW WILL WE IDENTIFY BLIND SPOTS ON OUR NEXT PROJECT?**



LOOKING FOR  
MORE?

REIMAGINE WITH  
DIANA  
KANDER 

The Retrospective is a fantastic start in making your team more innovative. But bringing in Diana and her team will take your experience to the next level. Challenge your team and find avenues for value with tools and insights you won't find anywhere else.

Interested? Email [Diana@DianaKander.com](mailto:Diana@DianaKander.com) to start the conversation.