

5 Best Practices to Work Differently



The Salesforce Ignite team is a passionate group of professionals who have been working differently (and loving it!) for years. We come from diverse backgrounds and experiences, but share a common love of creating new value and education. We're excited to work with you and your team to help you start working differently today.

The 5 Best Practices was developed based on our experience with customers on their journey to working differently.

Author: Salesforce Ignite; Nina Ziebarth-Pavlovich and Clay Stelzer

Design: Salesforce Corporate, Salesforce Ignite; Gina Reynolds and Avsar Modi



Table of contents

- 01** Embrace the collaborative cycle to make all meetings productive. [Page 06](#)
- 02** Get the right tools and resources for the job. [Page 13](#)
- 03** Pitch all work early and often. [Page 18](#)
- 04** Put your user at the center of decisions. [Page 24](#)
- 05** Make learning part of the to-dos. [Page 29](#)

All of the new techniques in design thinking, agile and lean start-up methodologies can seem overwhelming. It's hard to know where to start. But experimenting with even the smallest of changes in work practices is what we mean by “work differently.”



From theory to practice

Simple steps to practice day-to-day

Everyone wants to innovate, and there is no shortage of resources. But getting started and developing practices that stick can be a challenge. Here are our recommendations on the first 5 things to focus on to start working differently. From our experience, we've seen these simple steps have tremendous impact on teams and organizations. The practices drive engagement, critical thinking and help build momentum for new ways of working. We've kept it simple with just a few basic steps as well as ideas for leaders on how to foster the practice across your teams. You'll see you have what you need to get started tomorrow.

Enjoy!



01

Embrace the collaborative cycle to make all meetings productive

The collaborative cycle is the foundational structure for facilitating effective and efficient group interactions. It's a method of using individual notes or visuals to capture ideas and identify themes during team work.



01

Here's what to do

Train everyone on the collaborative cycle and start using it in all collaborative meetings—discussions, planning sessions, brainstorming and team downloads.



Get started



STEP 01

Stock supplies such as:

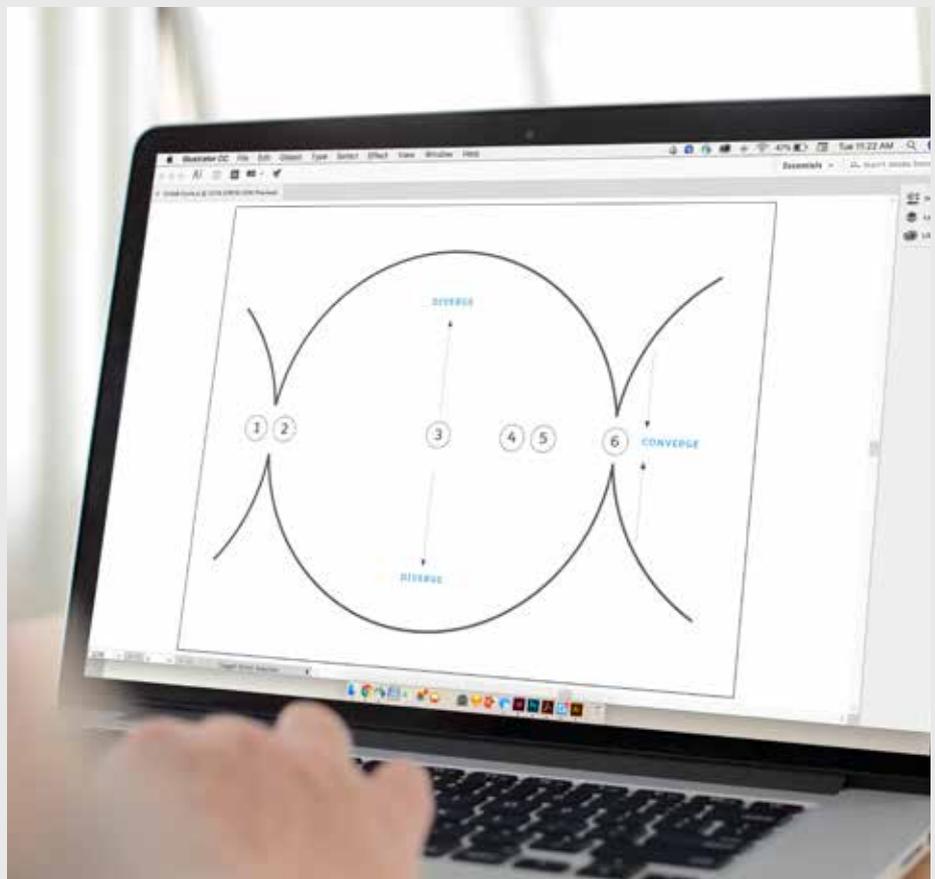
- Sticky notes
- Sharpies
- Sticky easel pads

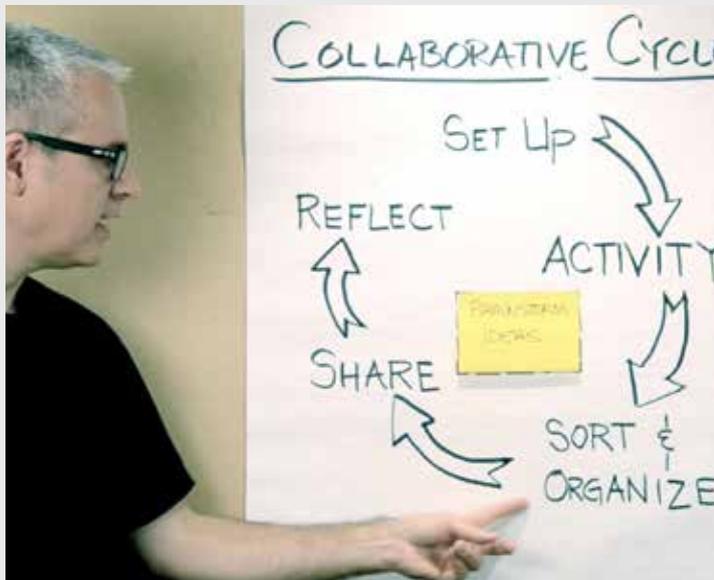


STEP 02

Refer to the collaborative cycle instructions on page 15.

Post instructions in meeting rooms, and distribute to team members.





STEP 03

Share the short video (on [salesforce.com/workdifferently](https://www.salesforce.com/workdifferently)) explaining the collaborative cycle with everyone on your team. Ask them to begin using this process for all team collaborations.

As you get started, don't hesitate to replay it at the start of meetings for a quick refresher.

STEP 04

When you meet with your team, get all ideas “out and up.” Encourage your team to jot down all ideas discussed (good or bad) on sticky notes, and put them up on a wall.

10 minutes before the end of the meeting, have everyone discuss what themes emerged from the conversation, and leave the last five minutes to determine next steps.

Document.



STEP 05

After each meeting elect someone to photograph the output and share digitally with the team.



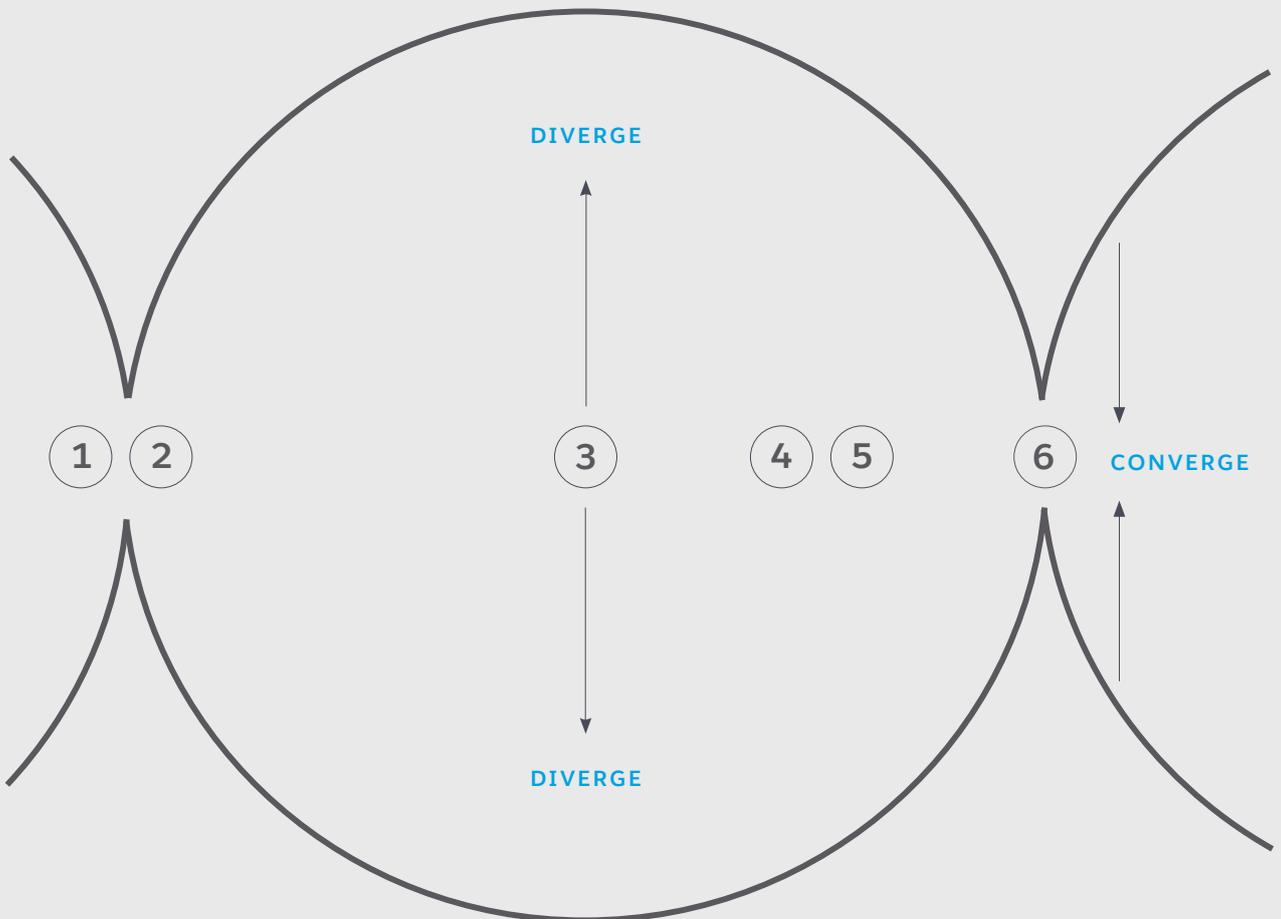
No matter how brilliant your mind or strategy,
if you're playing a solo game, you'll always
lose out to a team.

REID HOFFMAN
FOUNDER OF LINKEDIN



Collaborative Cycle

- 1 Remove distractions
- 2 Set session objective
- 3 Create tangible content by documenting words and ideas
- 4 Step back and organize
- 5 Reflect and discuss take-aways
- 6 Close with specific actions and deadlines



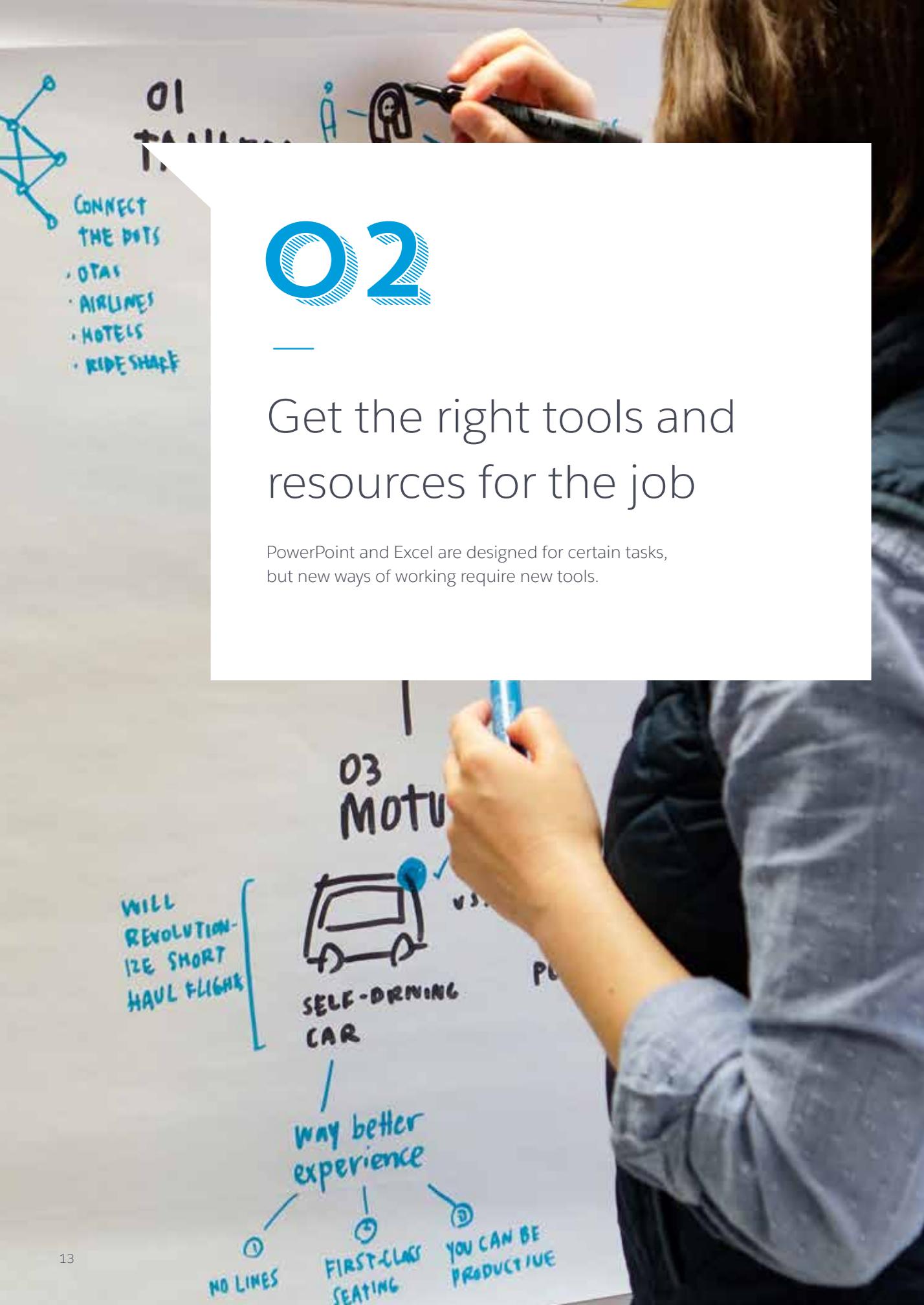
How to foster the practice

Leaders play a critical role in helping individuals and teams embrace new ways of working. Here are some simple ways to help your teams put these practices to work and make them stick.

Ask for photos of outputs from team meetings.

Inquire about all the new themes that emerged, not just a single solution.

Probe the group to look for alternative ways to organize information.



O2

Get the right tools and resources for the job

PowerPoint and Excel are designed for certain tasks, but new ways of working require new tools.

02

Here's what to do

Outfit individuals and collaborative spaces with the basic supplies needed to work tangibly to support collaboration and effective problem solving.



Get started



STEP 01

For each team member and conference room order:

- Sticky pads
- Sharpie markers
- Sticky easel pad
- Ream of A5 (1/2 sheet) size paper

Investigate potential administrative support for ordering and stocking supplies on a regular cadence as the practice develops.

STEP 02

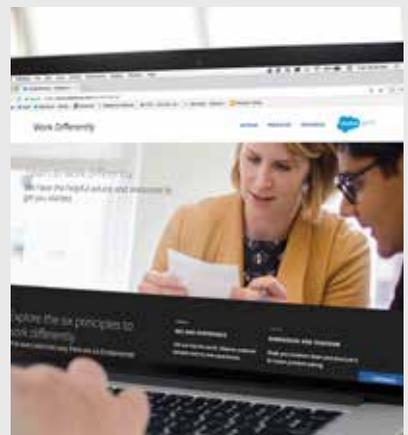
Consider investing in portable supply caddies that hold supplies on tables and allow team members to transport them from one work area to another.



STEP 03

Have resources and instructions available for the team to reference as you experiment with new ways of working.

Visit salesforce.com/workdifferently to download resources and instructional tools.





STEP 04

Once you've got the supplies, have everyone pick up a sticky pad and sharpie at the start of each meeting to jot down their ideas, suggestions and questions throughout the meeting.



STEP 05

Remind everyone to be tangible with their comments instead of just verbal.

STEP 06

Throughout the meeting pause to share and post sticky notes on a wall or movable board. Ensure all ideas are documented and able to be moved to other rooms as needed.

STEP 07

Have topic owners collect any sticky notes relevant to their work. Photo document any notable collections.



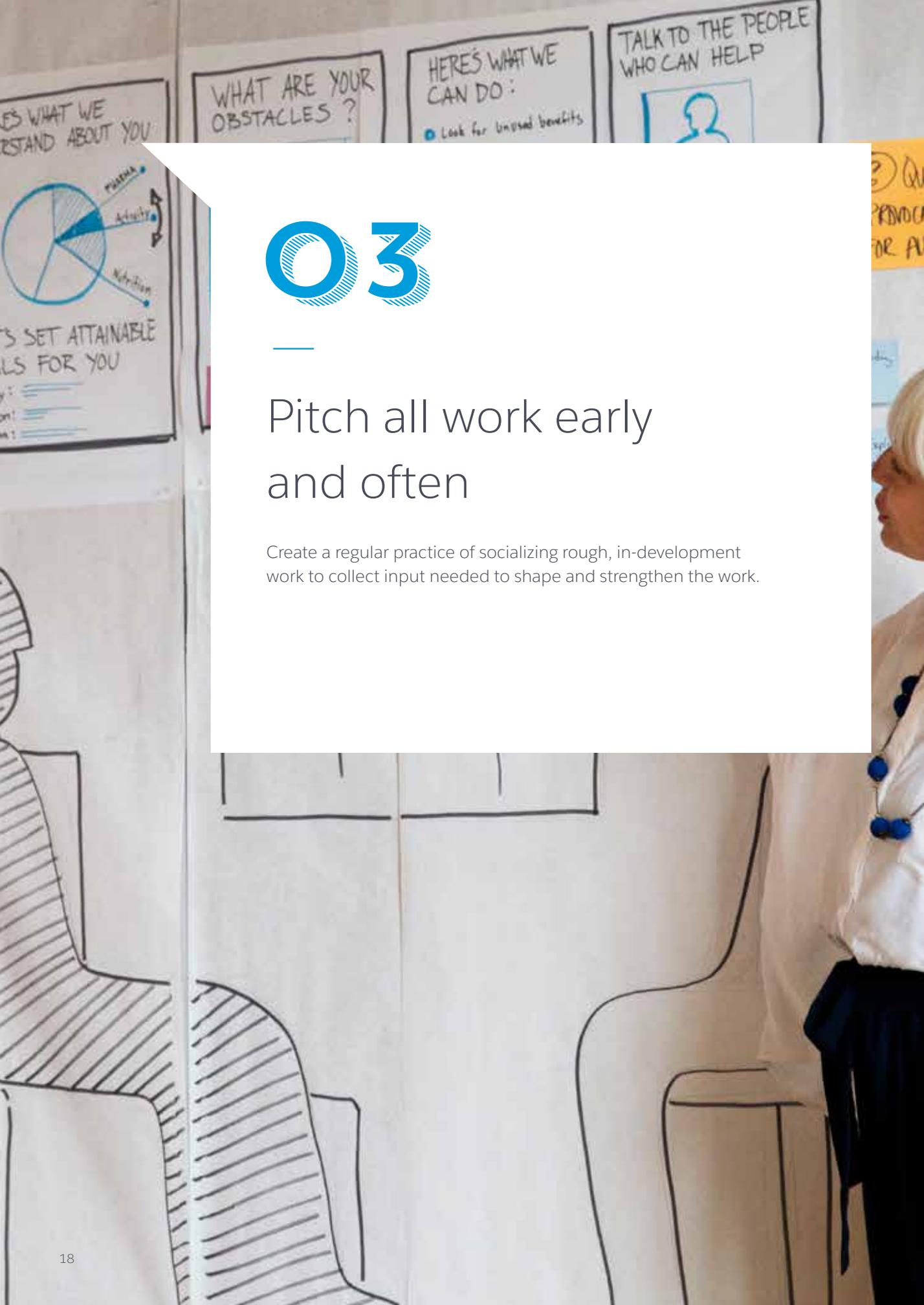
How to foster the practice

Leaders play a critical role in helping individuals and teams embrace new ways of working. Here are some simple ways to help your teams put these practices to work and make them stick.

Carry around a sticky pad and sharpie, and write 3+ notes a meeting.

Secure a small budget for supplies and assistance maintaining a stock.

Ask people to *“Please write down your ideas and post on the wall so we don’t lose track of them.”*



O3

Pitch all work early and often

Create a regular practice of socializing rough, in-development work to collect input needed to shape and strengthen the work.

03

Here's what to do

Establish a standing, weekly pitch hour for each working group to share rough work. The goal is to socialize and gather early input in order to efficiently make the work stronger.



Get started



STEP 01

Determine the best 60 minute time slot during the middle of the week (Tues-Thurs) for the team. Prioritize and protect this block of time.

STEP 02

Establish expectations for the meeting:

- Have presenters pin up a physical copy of their work to share – print out decks, sketches of new processes, drawings of ideas, etc.
- Have each person give a quick pitch to establish the context by setting up the work and the specific type of feedback they would like to receive.
- Determine the meeting structure and presenter schedule in a shared document everyone can access. Ensure everyone presents regularly.



STEP 03

To ground everyone in the right mindset, download the Elevator Pitch method card and read out loud at the beginning of each meeting.

Visit salesforce.com/workdifferently to download resources and instructional tools.





STEP 04

As teams get started, consider having someone from another working group attend as a facilitator to keep the group focused on the work in front of them, encourage productive behaviors and provide gentle time reminders.



STEP 05

Kickoff the pitch meeting by reminding everyone of the purpose of the meeting: to share in development work and receive feedback for quick, iterative shaping.

STEP 06

Regardless if an idea is written on the back of a napkin or in an almost final PowerPoint deck, encourage everyone to pitch what they have created that week. Set the expectation to shoot for “roughly right” content that isn’t finished.

Remind presenters to set context and be specific about the type of feedback they want and don’t want. Remind reviewers to focus on providing constructive comments about the work in front of them-not the context, project approach or individual team member.

STEP 07

Thank presenters for sharing, as well as the group for providing feedback. Verbalize a few key insights that emerged.

How to foster the practice

Leaders play a critical role in helping individuals and teams embrace new ways of working. Here are some simple ways to help your teams put these practices to work and make them stick.

Ask to see in-progress work.

Remind people they don't need to accept your input just because it's from you.

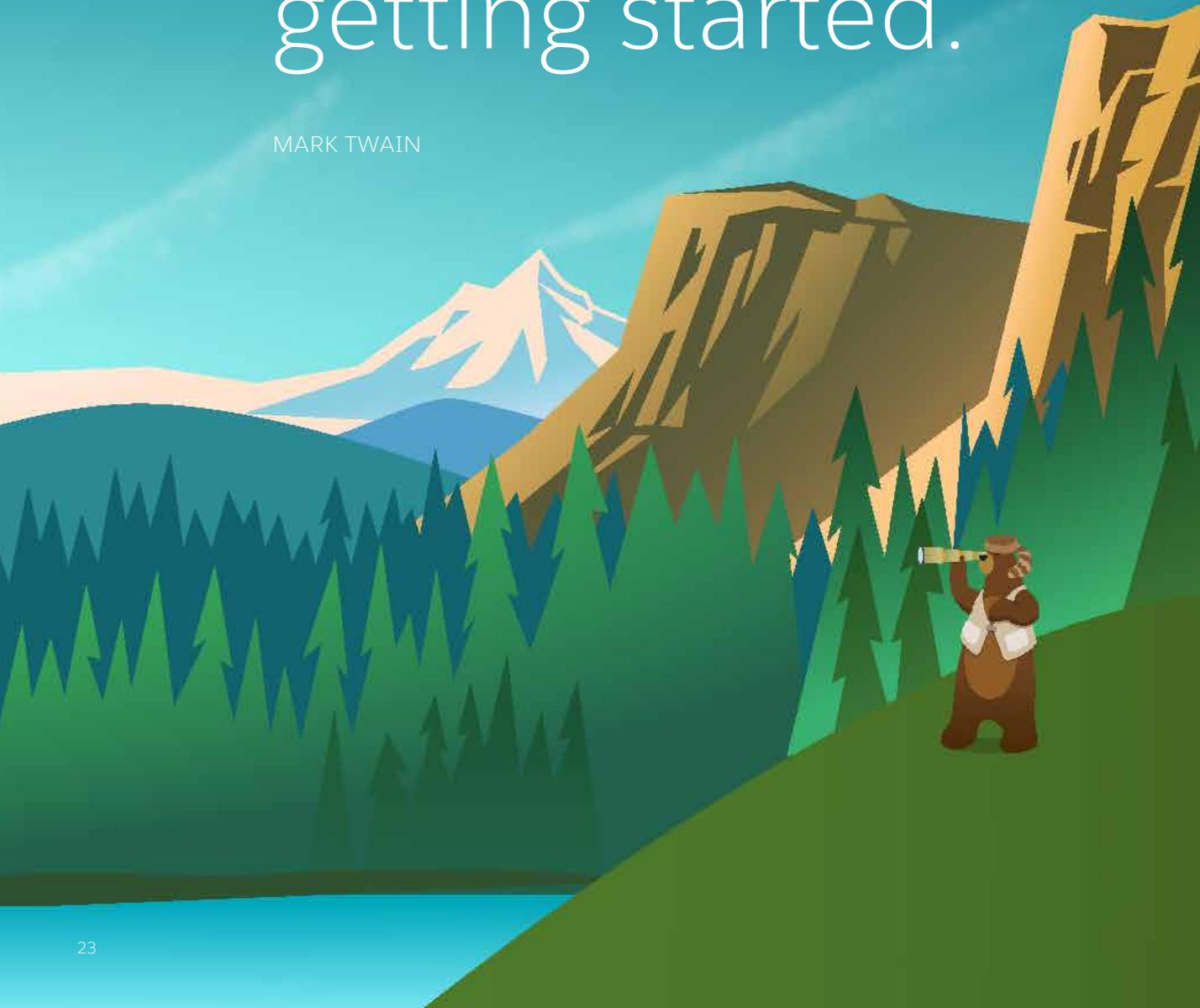
Encourage the team pitching to pitch without interruption and be clear about the type of feedback they are looking for.

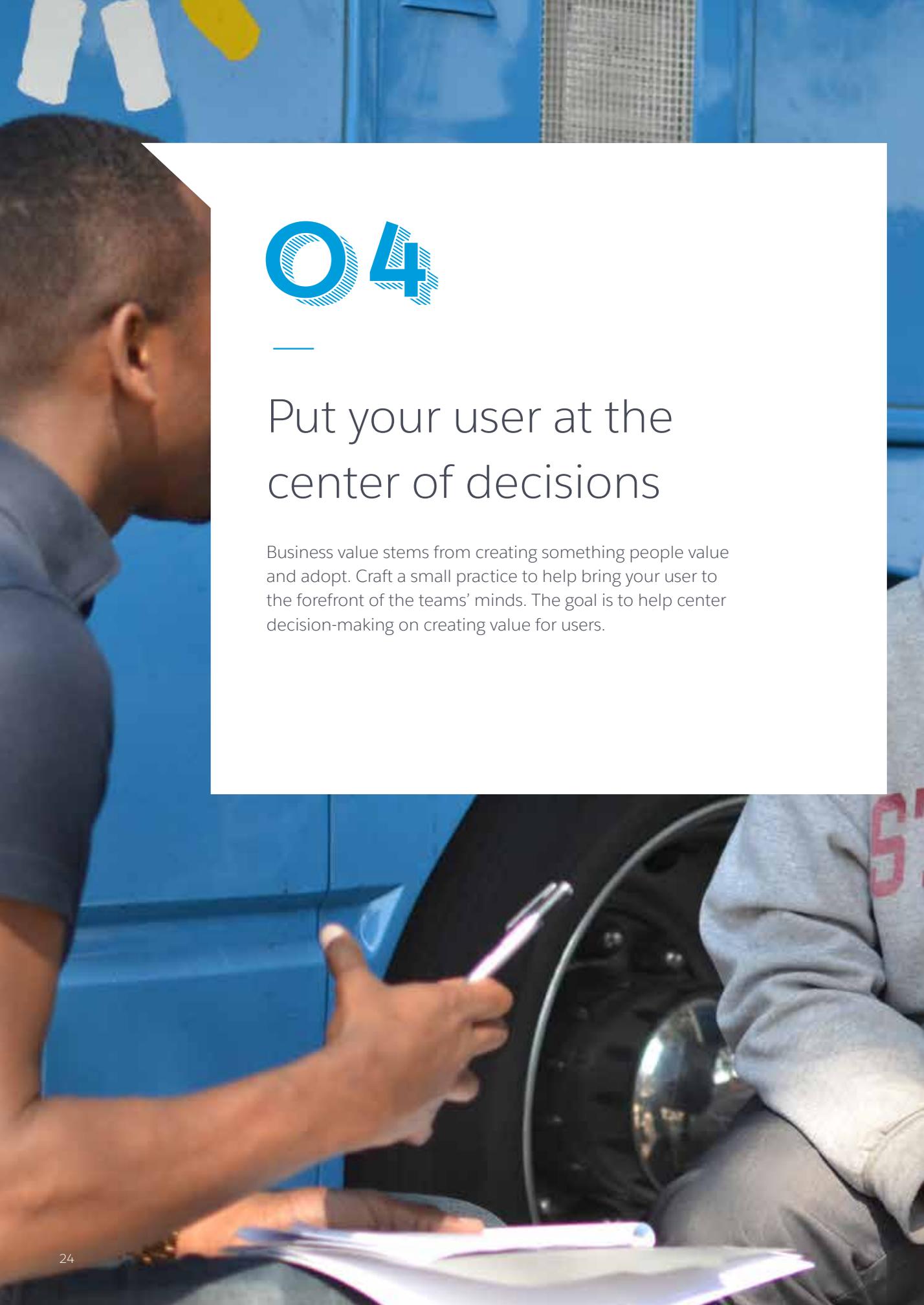
Avoid asking probing questions; instead, directly state your observation.



The secret of
getting ahead is
getting started.

MARK TWAIN





O4

Put your user at the center of decisions

Business value stems from creating something people value and adopt. Craft a small practice to help bring your user to the forefront of the teams' minds. The goal is to help center decision-making on creating value for users.

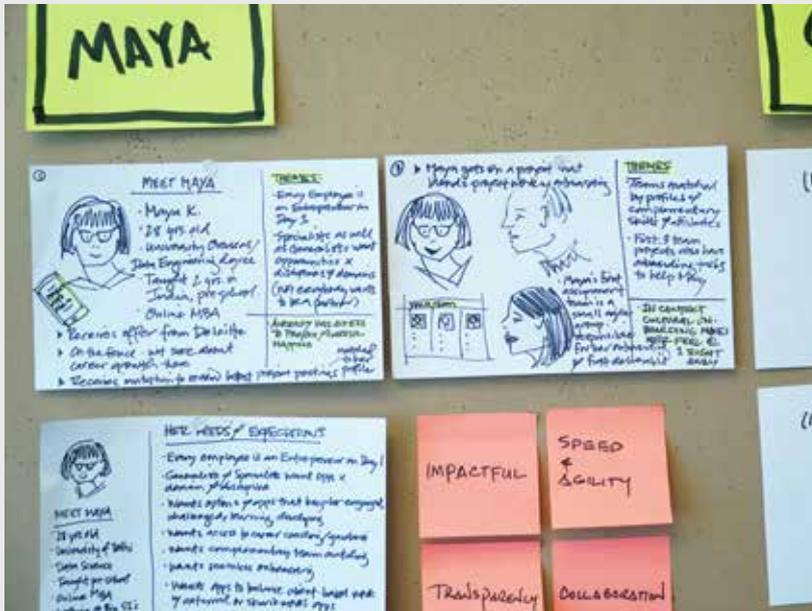
O4

Here's what to do

Surround yourself with artifacts from your users. Develop a trigger for your team to ask “*What would the user really want?*” to guide your discussions and decision-making. Designing for your users by keeping them in the forefront helps ensure your solutions get adopted.



Get started



STEP 01

Collect photos, quotes and other real life artifacts about your users – the less polished and the more authentic, the better.

STEP 02

Post artifacts in physical spaces, and find ways to circulate digitally for remote team members. Immerse the team in the lives of the user to help them focus on the unmet needs to solve for.

STEP 03

Create an ever-present representation of the user to ensure the team is keeping her top of mind. For example, keep an empty seat at the table for the user, and refer to her by name.

Be deliberate about incorporating the cue into team meetings, and create space for discussion.





STEP 04

As you get started, consider asking for a few volunteers to play the role of “user defenders” who make it a point to speak up on the user’s behalf. Make it their job to ask the group “*What would the user want?*”

STEP 05

Make it a point to talk about the user at least one time in every discussion related to developing new solutions.

STEP 06

Wrap up planning and decision-making sessions with the question “*Are we clear on the implications to the user experience?*”

STEP 07

Have fun collecting and refreshing user artifacts as the team spends more time with users.



How to foster the practice

Leaders play a critical role in helping individuals and teams embrace new ways of working. Here are some simple ways to help your teams put these practices to work and make them stick.

When teams share plans or solutions, ask “*What are the implications for the user?*”

Reference users from research by their names to anchor discussions in real world context.

Do your own light research, and find time to shadow at least one user yourself.



05

Make learning part of the to-dos

Doing something new requires trial and error. This can feel risky. It's easy to default to old practices that feel comfortable. Call attention to the persistence and humility required to develop new practices, and reinforce these behaviors in order to encourage continued experimentation and progress.

05

Here's what to do

Create specific checkpoints to reinforce the importance of continued learning and experimentation. Find ways to promote ongoing sharing of new practices and insights as they're uncovered.



Get started



STEP 01

Identify one or two regular meetings where you can dedicate five minutes to talk about Work Differently ‘experiments.’ Incorporate into the agenda and facilitate a discussion about what the team has learned each week. Every one to two weeks is an ideal cadence.

STEP 02

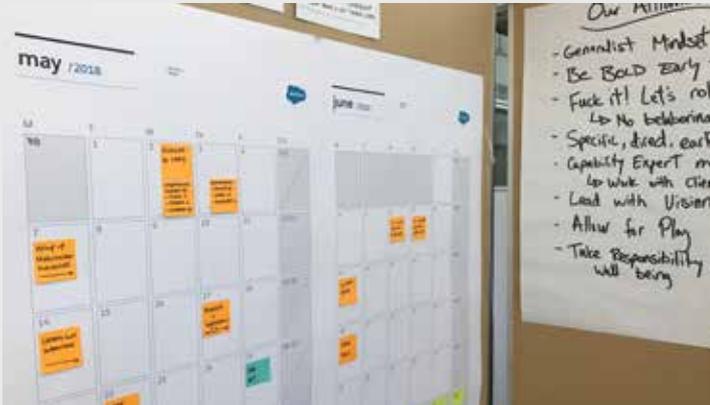
Identify one or two people (who are excited about learning) to own this section of the agenda and ask each week “*What have we learned?*”

STEP 03

Make the request of leadership to commit to:

- Model the process of learning through trial and error. Share one thing you learned from trying something new that may or may not have gone as expected.
- Celebrate each team member’s learning with encouraging comments as they discuss their experiments with the team.





STEP 04

Set-up a 45-day check-in to hear about progress on individuals' commitments and learnings. Send a prompt one week before the meeting.

STEP 05

Use the time allocated for Work Differently discussion to address any work process questions or insights. Make sure to talk about opportunities for experiments in the coming week.

Keep the conversation optimistic and hopeful to push past natural tendencies to only share success or 'right' answers.

If leaders' voices are absent, call on them to share their perspectives.

STEP 06

At the 45-day check in reflect on learnings: how it went, tips and tricks learned, things I wish I had, what I'm going to try next.



How to foster the practice

Leaders play a critical role in helping individuals and teams embrace new ways of working. Here are some simple ways to help your teams put these practices to work and make them stick.

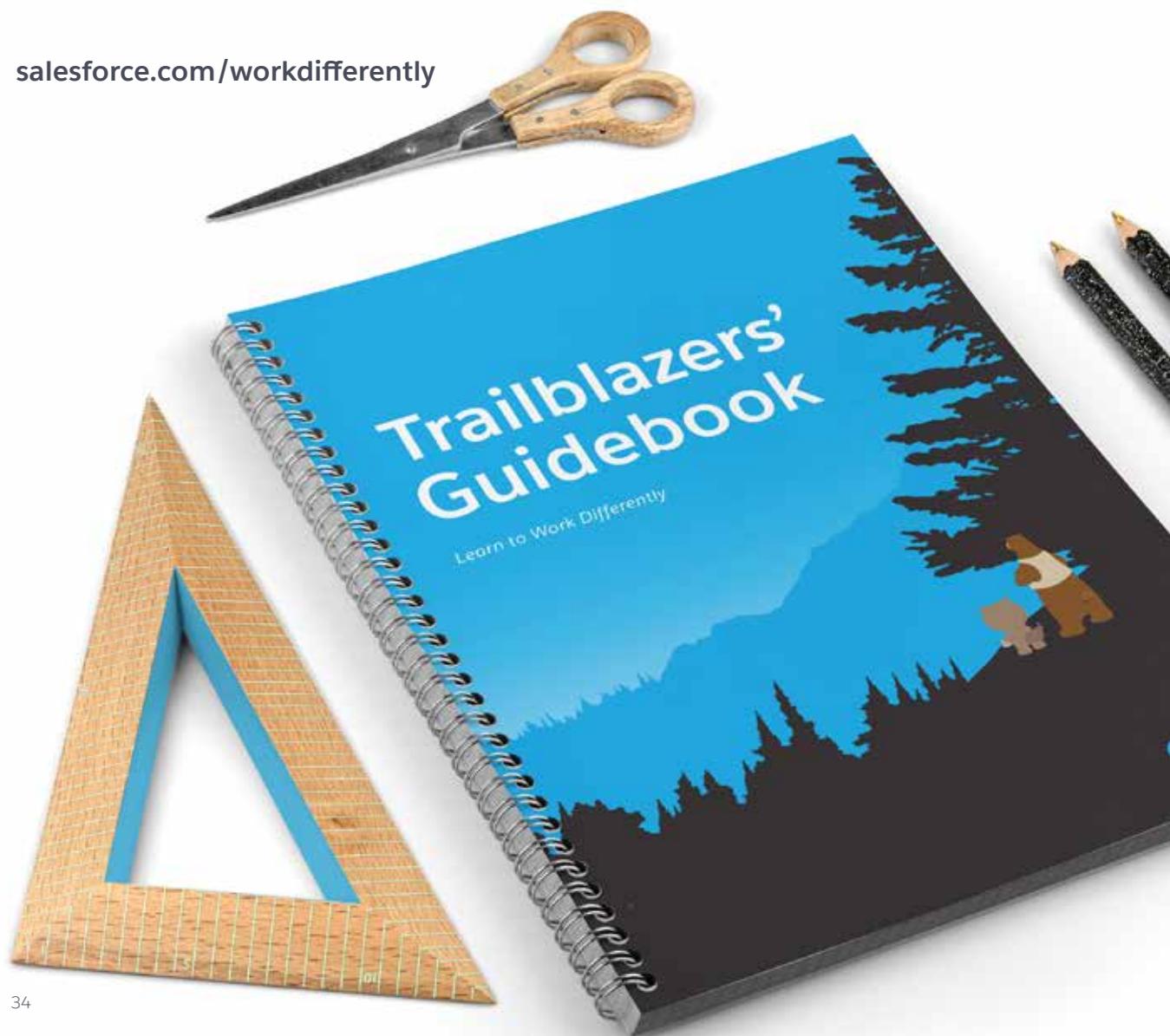
Reflect on how you can model the vulnerability that comes with trying something new.

Carve out time to be imperfect.

Look for ways to reinforce specific actions taken by team members... especially those that didn't go as planned.

Find your
resources at:

salesforce.com/workdifferently





salesforce ignite

salesforce.com/workdifferently