Ultimate

Team Building Pack

2

Purpose & Audience

Purpose

- *Ultimate Team Building Pack 2* contains 12 tools to help you and your organization increase team performance; they have been used successfully in thousands of situations around the world.

- The tools help teams to work more effectively; they improve collaboration, create inclusion and build commitment.

- Each tool is described clearly and succinctly so you are able to use them without special training.

Audience

- These tools are useful to you if you are involved in project or operational work where change and improvements are required and results expected.

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Tool/technique	What is it?	Why is it useful?	Team building	Solve problems	Generate ideas	Manage risks & issues	Improve collaboration	Create solutions
Balanced Scorecard	Establishes the KPIs by which to monitor your progress and performance against strategic goals.	To succeed, organizations need to monitor a balanced range of indicators.	✓		✓	✓	✓	✓
Creative Problem Solving	A framework of 5 tools that take you through a highly effective creative problem solving process.	These tools can help you achieve breakthrough ideas.	✓		✓	✓	✓	✓
ABC Avalanche	A basic but extremely powerful brainstorming technique.	Participants focus on generating a number of ideas so postpone judgments.	✓	✓	✓	✓	✓	✓
Association Flower	Generates a long list of associated keywords that can be used to generate even more ideas.	Gives you extra 'access points' from which to consider the challenge.	✓	✓	✓	✓	✓	✓
SCAMPER	A summary of 72 questions used by Alex Osborn (the man that founded brainstorming in the early 40s).	Approach the challenge from a different angle & generate a larger list of creative ideas.	✓	✓	✓	✓	✓	
Selecting Ideas & COCD Box	Boil down your grand list of ideas down to about 15 really good ones.	Forces you to shortlist your ideas to only the best ones to focus on in the next stage.	✓	✓			✓	
PPCO	Process to expand and test your best ideas for feasibility. PPCO is like a more positive version of a SWOT analysis.	Facing truth and reality in a way of opportunities.	✓	✓			✓	
RACI	A grid of activities mapped against the responsible, accountable, consulted & informed stakeholders.	Gives you a way to describe your multi-project work and deliver together effectively	✓	✓		✓	✓	✓
Culture Triangle	Helps teams or organizations understand each other better with a view to improving collaboration.	Helps you get behind the stereotypes that people hold about each other.	✓	✓			✓	
Team Review Workshop	Build a shared understanding within a team about what's working well, areas for improvement & opportunity.	Works well when assessing how multiple teams are working with each other.	✓	✓	✓	✓	✓	✓
Open Space Technology	Event format used in meetings of 5 to 2,000 people where the participants create the agenda for themselves.	Works best when there are hard problems to solve and urgency.	✓	✓	✓	✓	✓	✓
World Café	Simple, effective and flexible activity for hosting large group discussions for between 12 to 200 participants.	Help a large group understand a set of issues at their own pace.	✓	✓	✓	✓	✓	✓

Tools & Activities

Balanced Scorecard	PPCO
Creative Problem Solving	RACI
ABC Avalanche	Culture Triangle
Association Flower	Team Review Workshop
SCAMPER	Open Space Technology
Selecting Ideas & COCD Box	World Café

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Objectives

- To create picture of your unit's performance, relative to the vision and strategy, in four main areas or 'perspectives': financial, internal, learning/growth and 'customer'/ stakeholder.

- Long term you are looking to improve internal processes, motivate employees, develop better information systems, improve customer satisfaction, have better progress monitoring and see an improved financial position.

Resources required

- Time: The time to produce this will be significantly reduced if elements such as strategy and vision already exist. Once set up it is an ongoing health check on your multi-agency unit, and will need to become part of people's everyday jobs.

- Number of People: About 15

- White board

- Flipchart

- Somewhere visible to display the scorecard

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What do you need before the workshop?

To give you the highest chance of success it would be wise if your stakeholders come armed with the following information:

- The company mission statement

- The strategic plan / vision

- The financial position of the company

- How the company is currently structured and operating

- The level of skill and expertise of all the employees

- The current customer satisfaction level

Process

1. Define the context within which the unit operates - e.g. children's services, how it has developed, and the purpose/mission of the unit. Consider this in the timeframe – yesterday, today and tomorrow (using SWOT, PEST etc.)

2. Establish or confirm the unit's vision.

3. Identify the perspectives for measurement that are clear and understandable for your unit. The original model uses four: financial, internal, learning/growth and the 'customer'/stakeholder. Others may be added, for strategic reasons.

4. Break the vision down according to each perspective and formulate overall strategic aims. Use the template as a guide.

5. Identify the critical success factors (the CSFs). What are the critical success factors for achieving our strategic goals?

6. Develop realizable measures with which to evaluate those factors. Consider carefully the interactions between the measures. Also try to identify any potential knock-on effects of the measures.

Process

7.   Analyze the measures as a whole to ensure they provide a 'balanced' picture.

8.   Establish a comprehensive, top-level scorecard and gain approval from your sponsors (you may be required to provide background to the scorecard's development). Even better would be have them in the room (observing the process, not participating).

9.   Take the top-level scorecard and create more detailed cards translating strategy down to day-to-day tasks.

10.   Formulate goals for every measure used. Ensure there are both short-and long term goals.

11.   Develop an action plan to achieve the goals and strategy that have been set. Prioritization will be key.

12.   Continuously review; use as a dynamic functioning part of people's daily jobs.

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Template

Vision

What is our shared vision of the future?

Perspective

Financial	Customers	Internal Business Processes	Learning and Growth
To achieve financially how should we appear to our funding providers?	*To achieve our vision, how should we appear to our customers/ stakeholders?'*	*To satisfy our funding providers and stakeholders what processes must we excel at?*	*To achieve our vision how will we sustain our ability to change and improve?*

Strategic Aims

If our vision succeeds, how will we differ?

Critical Success Factors

What are the critical success factors for achieving our strategic goals?

Strategic Measures

What are the measurements (or KPIs) that indicate our strategic direction?

Action Plan

What should be our action plan to succeed?

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Example

Vision

"To become a world renowned SCUBA diving center"

Perspective	Financial	Customers	Internal Business Processes	Learning and Growth
	To achieve financially how should we appear to our funding providers?	*To achieve our vision, how should we appear to our customers/ stakeholders?'*	*To satisfy our funding providers and stakeholders what processes must we excel at?*	*To achieve our vision how will we sustain our ability to change and improve?*

Strategic Aims

If our vision succeeds, how will we differ?

- High & even earnings - Delighted customers	- Delighted customers	- Quality equipment and processes	- Learning & development of employees

Critical Success Factors

What are the critical success factors for achieving our strategic goals?

- Reduce seasonality - Increase market share	- Varied dive sites - Safe diving	- Well-maintained kit - High turnover of equipment	- Employee training

Strategic Measures

What are the measurements (or KPIs) that indicate our strategic direction?

- Profit Q1 & Q2 - % market share	- No. of visitors - Visitor comments - No. of accidents	- Equipment turnover - Maintenance monitor	- Skills matrix

Action Plan

What should be our action plan to succeed?

- Promotions for out of season
- Identify new dive sites
- Design & implement a maintenance process
- Identify and attend suitable training courses

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Balanced Scorecard Secret Sauce

- The process of developing a scorecard is as valuable as the scorecard itself.

- Make sure you have a wide ranging stakeholder group in the room. Success depends on you being able to create a shared understanding of each scorecard dimension.

- You should not try and shoehorn existing measures into the scorecard; take the opportunity to have a new look at the business and develop both financial and non-financial measures accordingly.

Balanced Scorecard Secret Sauce

- Viewing the organization from different perspectives and different time dimensions provides a unique understanding of the business.

- Linking strategy to actions and measuring this on both a financial and non-financial basis provides a more balanced approach to organization development.

- Make sure all your Strategic Measures are SMART (Specific, Measurable, Achievable, Realistic and Timely) – you can't improve on things that you can't measure.

- Before diving into the Action Plan run a sanity check to make sure all the suggested measures align with the Strategic Plan.

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Tools & Activities

Balanced Scorecard

Creative Problem Solving

ABC Avalanche

Association Flower

SCAMPER

Selecting Ideas & COCD Box
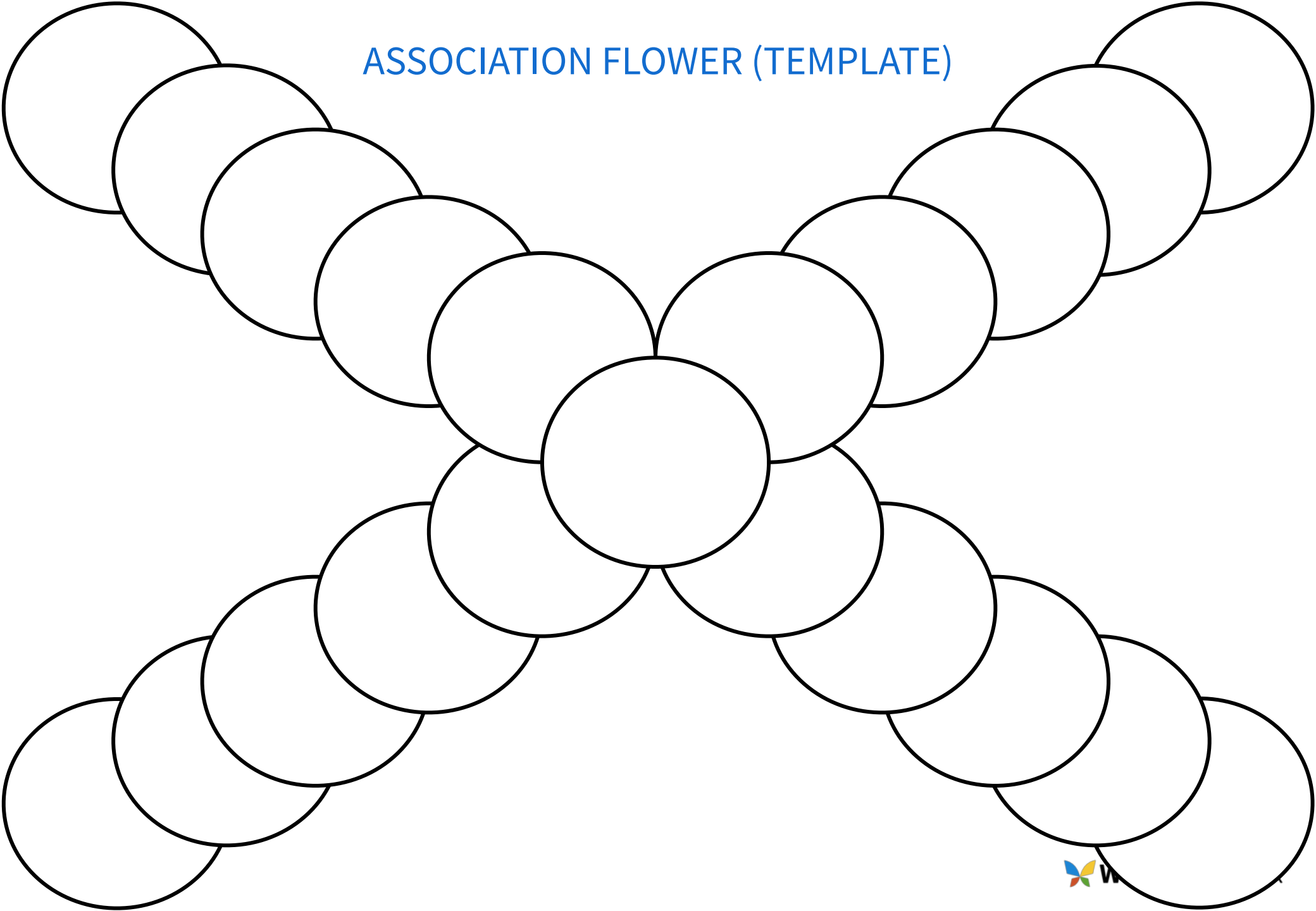
PPCO

RACI

Culture Triangle
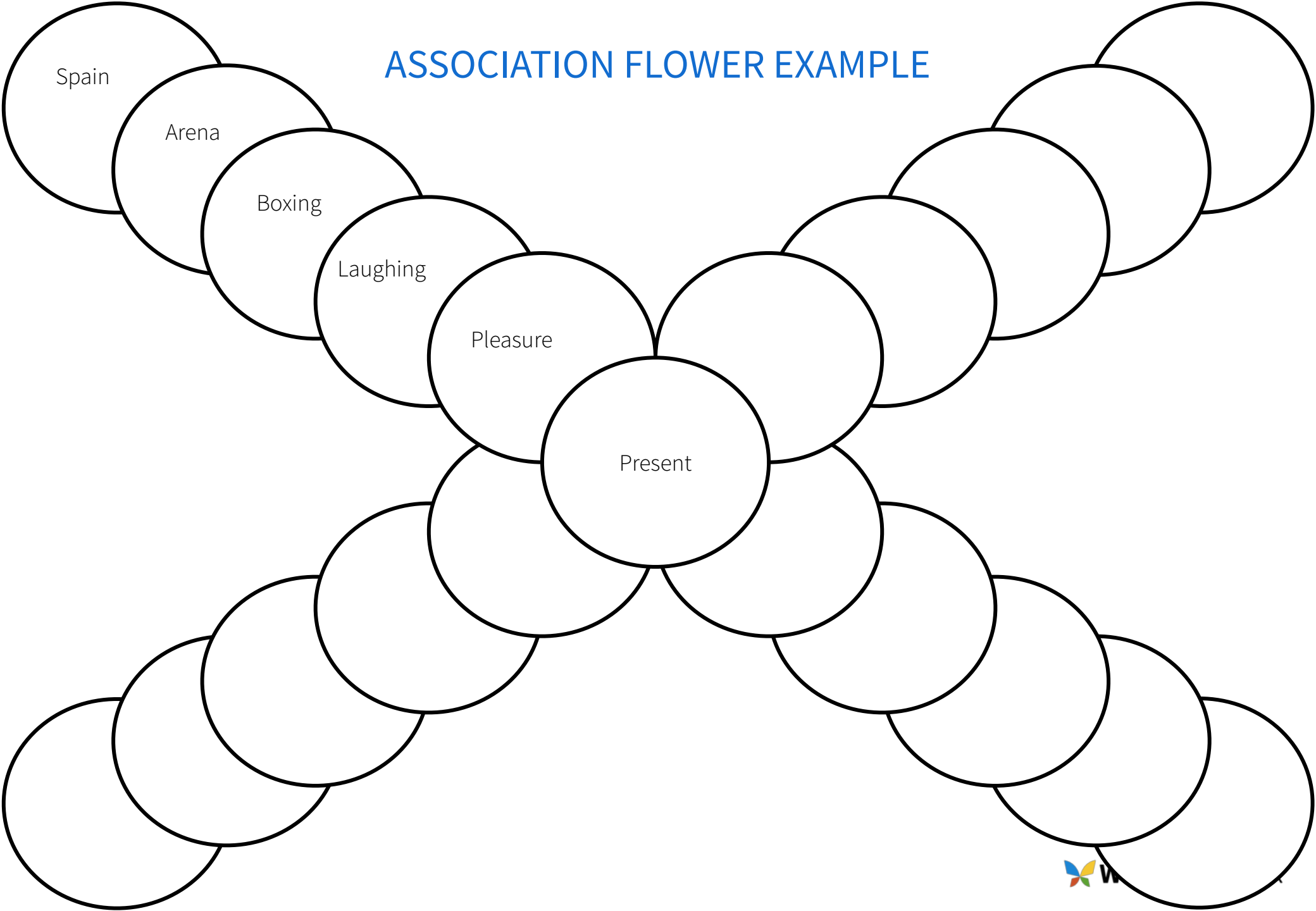
Team Review Workshop

Open Space Technology

World Café

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Objectives

- To generate a list of highly creative ideas to a shared challenge.

- To systematically select the best ideas and conduct initial feasibility studies.

- To help people mobilize their creative thinking skills.

Creative Problem Solving Process

IDEA GENERATION

ABC Avalanche

IDEA EXPANSION

Association flower
SCAMPER

IDEA SELECTION

Selecting ideas &
COCD Box

IDEA FEASIBILITY

PPCO

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Tools & Activities

Balanced Scorecard	PPCO
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Selecting Ideas & COCD Box	World Café

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ABC AVALANCHE

1. Write down the central question.

2. Write down the letters of the alphabet in two columns.

3. Generate many ideas.

4. Sort them by their first letters.

5. Complete the alphabet.

A	....	J	....	S	....
B	....	K	....	T	....
C	....	L	....	U	....
D	....	M	....	V	....
E	....	N	....	W	....
F	....	O	....	X	....
G	....	P	....	Y	....
H	....	Q	....	Z	....
I	....	R	....		

Tools & Activities

Balanced Scorecard

Creative Problem Solving

ABC Avalanche

Association Flower

SCAMPER

Selecting Ideas & COCD Box

PPCO

RACI

Culture Triangle

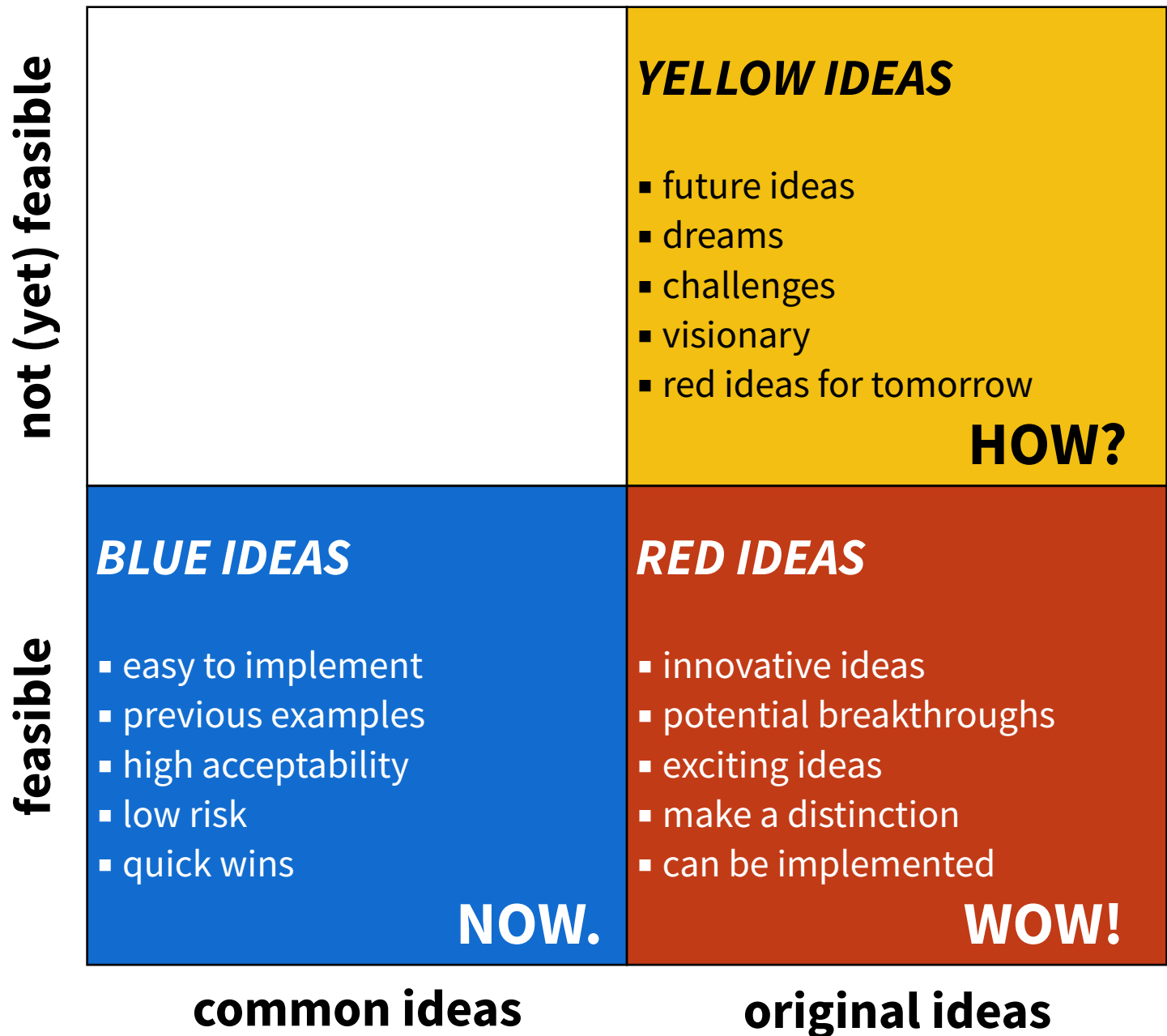Team Review Workshop

Open Space Technology

World Café

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ASSOCIATION FLOWER

1.   Write keyword in center of piece of paper (see template on next page).

2.   Write around this keyword four associations.

3.   Make at each word a chain of 5 associations.

4.   Focus on one word and make a force-to-fit to the initial question; write down your new ideas.

5.   Take other words and do the same.

6.   Make the list of ideas as large as possible.

ASSOCIATION FLOWER (TEMPLATE)

ASSOCIATION FLOWER EXAMPLE

Spain

Arena

Boxing

Laughing

Pleasure

Present

Tools & Activities

Balanced Scorecard

Creative Problem Solving

ABC Avalanche

Association Flower

SCAMPER

Selecting Ideas & COCD Box

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SCAMPER

1. SUBSTITUTE - parts, the whole, material…

2. COMBINE - functions, material, just different…

3. ADAPT - other color, place, use, form, timing…

4. MAXIMIZE - bigger, stronger, longer, more time, macro level, use more often…

5. MINIMIZE - smaller, lighter, shorter, micro level, less important…

6. PUT TO OTHER USES - other context…

7. ELIMINATE - parts, functions, material…

8. REVERSE - sequence, upside down, inside out…

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Tools & Activities

Balanced Scorecard

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SCAMPER

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SELECTING IDEAS

- 5-15 IDEAS: everybody selects his or her 1-3 favorite hits; make out of these a top 3.

- 15-40 IDEAS: 5 sparkling ideas per person; focus on these and define an overall top 5 using dots or hits.

- >40 IDEAS: select individually 5-8 blue-red-yellow ideas (COCD-box); define the BIG 5 in each color.

COCD BOX

1. Select individually 4-8 favorite blue, red and yellow ideas (now-wow-how).

2. Mark your selected ideas on the idea lists.

3. Put the 10-15 most favorite ideas into the COCD-box.

4. Check if these are really the best ideas.

5. Try to combine these 10-15 ideas into a few powerful concepts.

COCD-BOX ®

not (yet) feasible

YELLOW IDEAS

- future ideas
- dreams
- challenges
- visionary
- red ideas for tomorrow

HOW?

feasible

BLUE IDEAS

- easy to implement
- previous examples
- high acceptability
- low risk
- quick wins

NOW.

RED IDEAS

- innovative ideas
- potential breakthroughs
- exciting ideas
- make a distinction
- can be implemented

WOW!

common ideas   **original ideas**

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Tools & Activities

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PPCO

Pluses - what is good, positive about the idea.

Potentials - what are the possibilities if the idea were pursued.

Concerns - phrase shortcomings or limitations of the idea as questions.

Overcomes - generate ideas to overcome the 'burning' concerns.

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Objectives

- To help teams clarify individual, team and organizational roles and responsibilities.

- To identify and clarify personal accountabilities.

- To reduce misunderstandings between colleagues.

What Does RACI Mean?

Responsible	The person or position responsible for doing the activity (the work).
Accountable	The person or position accountable to ensure the activity happens. If things go wrong - "it's their head on the chopping block".
Consulted	The person or position who should be consulted prior to a decision or action being taken.
Informed	The person or position that needs to be informed after completion of the task or decision is made.

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Resources Required

- White board, multiple flip chart papers or large space to write on.

- Packs of multi-color post-its.

- Lots of pens.

- Open-plan room with lots of space to walk around.

Process

1. Choose one activity to focus on for your chart
   - Determine the activity you want to look at.
   - You can apply a RACI matrix to either a broad issue or a very specific issue – the choice is yours.
   - E.g. do you want to create a RACI for the complete product launch process, or just part of it? Each will give you very different charts. Remember you can always do both.

1. What are the activities, tasks or steps involved?
   - This is where a RACI matrix has similarities to project planning.
   - You need to think through all the different steps in the activity or decision making process.
   - Use one color of Post-It notes to capture all potential activities. Place the individual notes vertically in a list.

Business case					
Finance Plan					
Implementation					
Launch					
Event					
Video Release					

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Process

3. Who are the key stakeholders?
   – This is where a RACI matrix is similar to stakeholder analysis.
   – Who needs to be involved? Who thinks they should be involved? Who did you forget?
   – For a complicated project or program, you should make sure you brainstorm as a group during this step to reach agreement as a collective.
   – Use another color of Post-It notes to capture all potential roles.
   – Place the notes horizontally across the board.
   – Then draw a grid with the activities and horizontal roles

3. Decide if you want to chart the "as is" or the "will be"
   – You need to decide are you going to chart the "as is" (the way it's working today?), or the "will be" (the way it should work in the future)?
   – Sometimes the answer is obvious: If you are doing a plan for the future, you are charting future roles.
   – Keep in mind, it is also possible to chart the "as is" situation to learn more about how a system or process is working today.

	Executive	Finance	Account Lead	Director	Production	SAE
Business case						
Finance Plan						
Implementation						
Launch						
Event						
Video Release						

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Process

5. Use Post-It notes in the RACI chart with codes
   - Write "R", "A", "C", and "I" on their own Post-Its and place them on the chart intersecting activities with the stakeholders.
   - This step should always be done as a group.
   - If you have enough colors use different color of Post-It notes to identify roles.

6. Negotiate how you see the roles and how others see them
   - You will quickly learn how people's perceptions differ from each other.
   - You will also likely discover a better way of working.
   - The aim of this step is to reach a common understanding of how it is now or how it will be in the future (depending what you chose in step 4)

	Executive	Finance	Account Lead	Director	Production	SAE
Business case	R		A		C	I
Finance Plan	A	R		C	I	
Implementation	C			I		A
Launch	I			R		
Event	R	I		A	C	
Video Release			I	A	R	C

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Process

7. Do a vertical analysis (looking at the stakeholders and their respective responsibilities)

   – Are there too many R's? Can the functional role stay on top of so much stuff? Can the decision / activity be broken into smaller, more manageable tasks?

   – Does someone have no R's or A's? Should this role be eliminated or shifted? Have processes changed to a point where resources should be re-distributed?

   – Are there too many A's? Does a proper "separation of duties" exist? Should other groups be accountable for some of these activities to ensure proper checks and balances? Is this a "roadblock" in the process and is everyone waiting for decisions or direction as a result?

   – Empty spaces? Consider who you need to add.

Process

8. Do a horizontal analysis (looking at activities and the stakeholders playing a role)

  – Are there no R's? Is the job really getting done? Why is there no "leader"?

  – Too Many R's? This is likely a sign of "too many cooks" or a round-robin of "passing the buck".

  – Too many A's? Is there confusion? Is there (or will there be) potential conflict because every person with an "A" has a different view of how it is or should be done?

  – Too many C's? Do all the roles really need to be consulted?

  – Too many I's? - Do all the roles need to be regularly informed or only in certain circumstances?

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RACI Secret Sauce

- With complicated tasks, it's inevitable that more than one person needs to collaborate to get the job done. The danger with this is that it can be like two players running to make the same catch – the ball can go straight down the middle because each one is thinking, "oh, that's their ball." To avoid this you can designate one person as the "R-prime or R1" which means that in terms of accountability, this person is #1.

- RACI matrix experts say you should assign only one "A" to a responsibility chart, but often in complex systems that's not possible. The key point is the more "A's" are attached to a decision, the longer it takes to move forward. So use A's judiciously.

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RACI Secret Sauce

- It is common to have more than one role at a time. You can have the Authority (A) and the Responsibility (R) for a task if you do the work and also decide which next step to take.

- You can also combine the Authority (A) and the Consultation (C) roles if you provide a directive for someone else to get additional information before an approval is made.

- It is less common but possible for someone to keep the Consultation (C) role and the Inform (I) role when delegating a task, but give both the Responsibility (R) and the Authority (A) to someone else. In this case you would say, "Take my point of view of what's important, but then go and decide what to do next yourself. Just let me know after what you've decided."

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Tools & Activities

Balanced Scorecard	PPCO
Creative Problem Solving	RACI
ABC Avalanche	**Culture Triangle**
Association Flower	Team Review Workshop
SCAMPER	Open Space Technology
Selecting Ideas & COCD Box	World Café

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Objectives

- To surface and start to address some of the underlying problems that arise when representatives from different departments or companies work together.

Process

1. The Facilitator presents the two cultural stereotypes slides.

2. The Facilitator draws a large triangle on a flip chart and labels it.

3. Each Team / Department / Company is allocated a colour of sticky dot.

4. The Facilitator distributes a multi-coloured series of sticky dots to each individual in the team.

5. Each Individual now places the relevant sticky dot on the triangle according to where they think each of the Teams are in terms of cultural stereotypes.

6. When this exercise is completed, each Individual is asked how they feel about their Team's overall positioning on the chart. They can also ask for specific feedback from anyone on the reasons for their positioning.

7. The Group now discusses the implications of this exercise for their on-going team-working.

8. The Facilitator leads a plenary discussion using the Strengths & Weaknesses slides.

🔵	Marketing
🔴	Sales
🟡	Customer Care
🟢	Legal

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Consider these three organizational stereotypes: Friendly Helpers, Tough Battlers and Logical Thinkers

	Friendly Helper	Tough Battler	Logical Thinker
Characteristics	World of mutual love, affection, tenderness, sympathy	World of conflict, fight, power, assertiveness	World of understanding, logic, systems, knowledge
Task maintenance behaviour	Harmonising, compromising, encouraging, expressing warmth	Initiating, coordinating, pressing for results, consensus, exploring differences	Gathering information, clarifying ideas, procedures, evaluating the logic of proposals, systematising
Constructs used in evaluating others	Who is warm, who is hostile, who helps, who hurts others	Who is wrong, weak, winning, losing	Who is bright, stupid, accurate, wrong, who thinks clearly
Methods of influence	Appeasing, appealing to pity	Giving orders, challenging, threatening	Appealing to rules, procedures, logic, facts, knowledge
Personal threats	That he/she will not be loved, that he/she will be overwhelmed by feelings of hostility	That he/she will lose the ability to fight, will become "soft"	That his/her world isn't ordered, that he/she will be overcome by emotion

… and the organizational cultures implied

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Organizations can be plotted on a culture triangle

Tough Battler

Team 2

Team 1

Friendly Helper

Logical Thinker

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Tough Battler

Friendly Helper

Logical Thinker
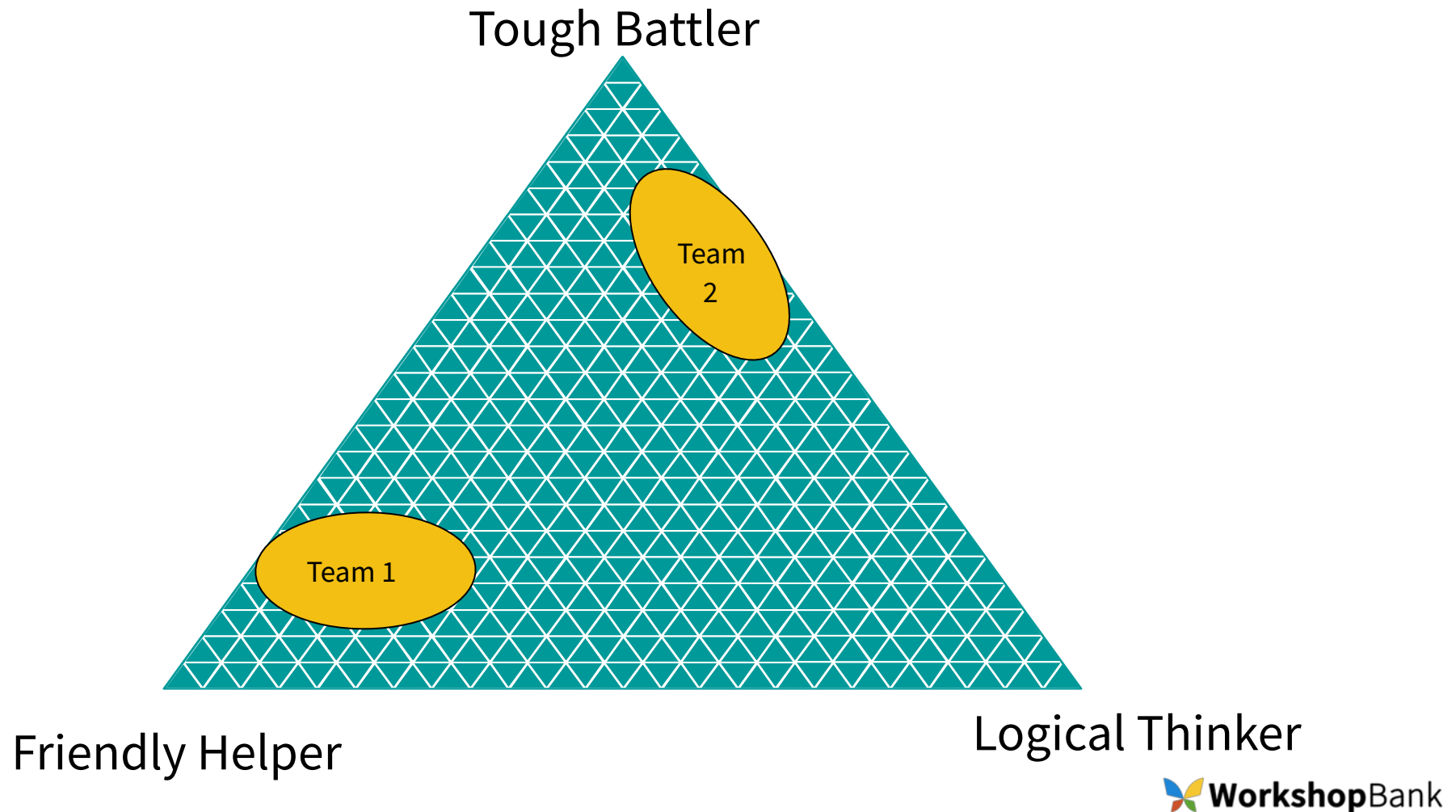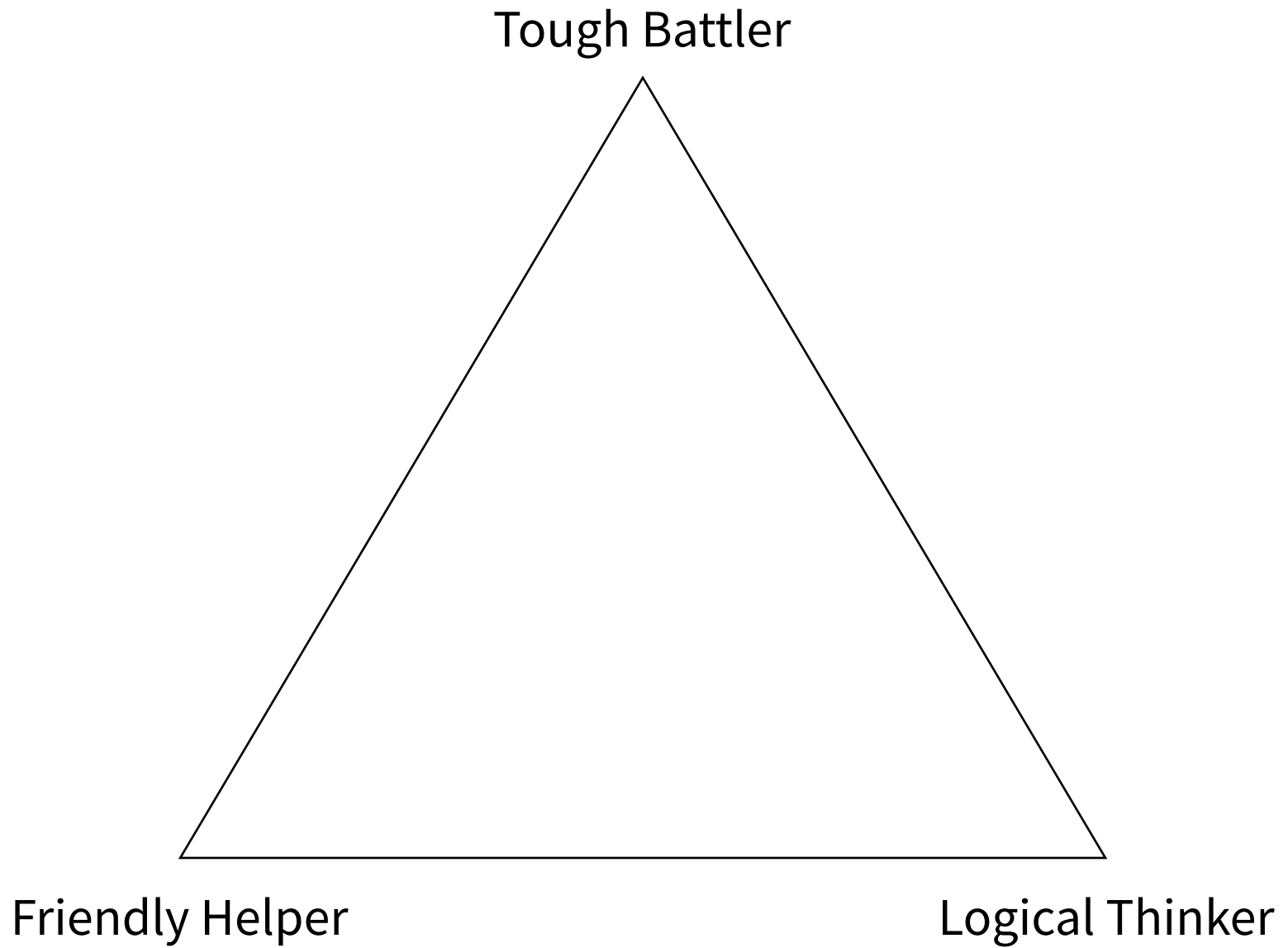
How do Tough Battlers view the strengths and weaknesses of other culture types?

	Strengths	Weaknesses
Tough Battlers see Friendly Helpers as	Good to work with, positive people. Nice to have around. No great threat. A resource.	Too soft, over-trusting. Easy to push around or manipulate. Inefficient.
Tough Battlers see Logical Thinkers as	Good at handling information, getting organised. A resource.	Too logical, rule bound. Concerned with procedure, not results.

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And Friendly Helpers?

	Strengths	Weaknesses
Friendly Helpers see Tough Battlers as	Strong, committed, concerned to do well. Likes to get the job done.	Big-headed, pushy, uncaring. Self-centred.
Friendly Helpers see Logical Thinkers as	Authoritative, well informed, reliable. Possibly intellectual.	A bit cold, unfriendly. More interested in ideas than people.

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And Logical Thinkers?

	Strengths	Weaknesses
Logical Thinkers see Tough Battlers as	Self-assured, strong. Resourceful and very energetic.	Hasty, unthinking impulsive. Too pushy, emotional and concerned only with winning.
Logical Thinkers see Friendly Helpers as	Cooperative, inclusive. Easy to get on with.	Too concerned with people. Irrational, sentimental, not very organised.

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Resources required

- Pack a multi-colored sticky dots (one color per team, each person needs to have one dot of every color).

- Flipchart, pen and paper.

- Open space for people to move around.

- No tables and chairs.

- The slides in this pack.

Culture Triangle Secret Sauce

- It's important participants view what they're about to hear about themselves as constructive feedback. If it looks like there are some who are taking the process personally pull back for a few minutes and discuss the importance of feedback for continuous improvement.

- As the plenary discussion progresses the facilitator will find it useful to capture headlines and actions. An honest purge of emotion and ideas often happens and you want to make sure you capture the essence so the teams move forward after they leave the room.

Tools & Activities

Balanced Scorecard

Creative Problem Solving

ABC Avalanche

Association Flower

SCAMPER

Selecting Ideas & COCD Box

PPCO

RACI

Culture Triangle

Team Review Workshop

Open Space Technology

World Café

WorkshopBank

Objectives

- To build a shared understanding within a team about what's working well, areas in need of improvement and areas of opportunity.

When Would You Use It?

- In any team meeting when you want to review your team's current situation.

- This activity also works well when assessing how multiple teams are working with each other.

Resources required

- 1 hour.

- A large piece of blank paper up on a wall.

- Space around the paper for people to comfortably stand around and space to move.

- Lots of post-it notes and marker pens for each person in the team.

- A few sheets of dot stickers.

- Scissors (to cut the dot stickers out so each team member has a limited number for voting).

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Process (1)

1. The Facilitator starts the activity by explaining to the team that you are going to spend the next hour reviewing progress.

2. The first 10 mins are to focus solely on the question "what are we doing well?" Each Participant picks up some post-its & pen and writes as many things as possible (one per post-it).

3. The second 10 mins are to look at answering "what could we do better?" Instead of focusing on the negatives try and keep people on improvements, e.g. "it would be even better is we did this …"

Process (2)

4. The third 10 mins are to look at answering "what more could we do?". These should be new opportunities rather than improvements on existing activities.

5. The Facilitator asks the group to spend a few minutes collecting the points into themes.

6. The Facilitator then gives each Participant a fixed number of dots and asks them to stick them on the themes that are important to them. Be clear they can put them where they want, i.e. all on 1 very important theme to them or spread out over many.

Process (3)

7. Once the voting is finished you can lead a discussion on what happens next. One suggestion you can consider is take the Top 3 themes that received the most votes and run a Brown Paper Planning session to make sure you end with an action plan and a positive result.
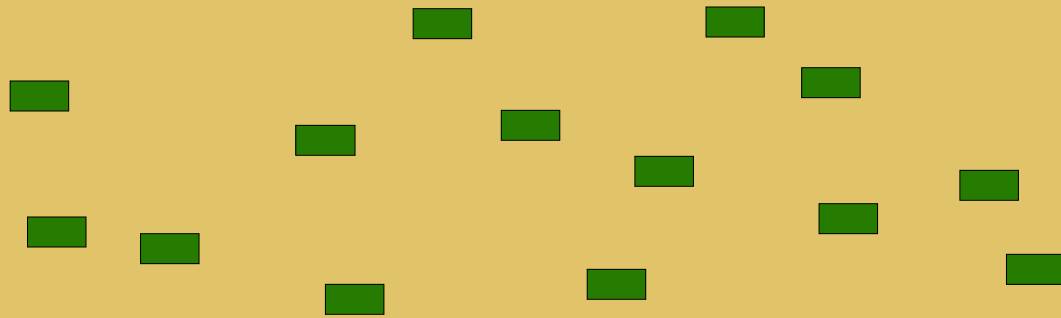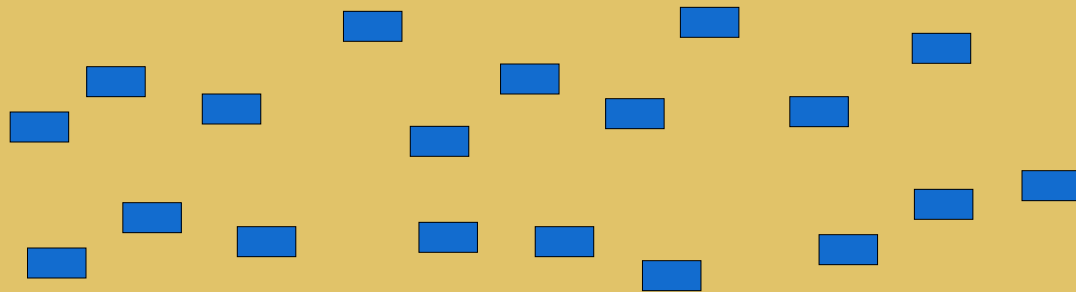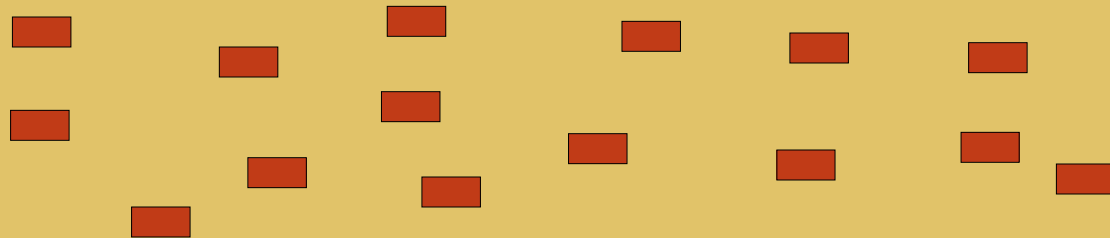
What are we doing well?	
What could we do better?	
What more could we do?	

What are we doing well?	
What could we do better?	
What more could we do?	

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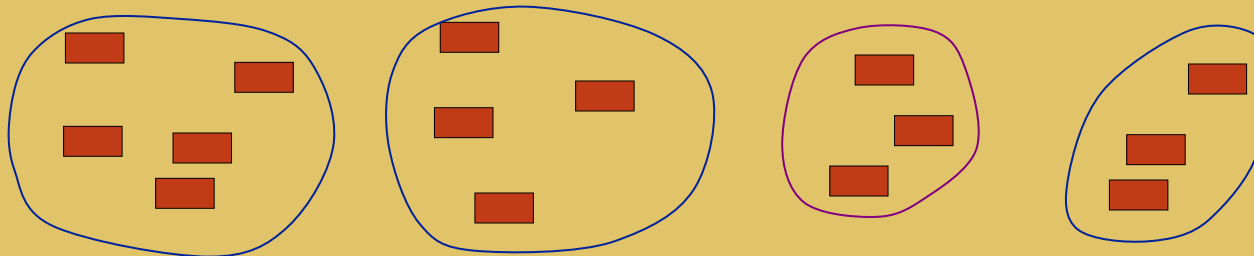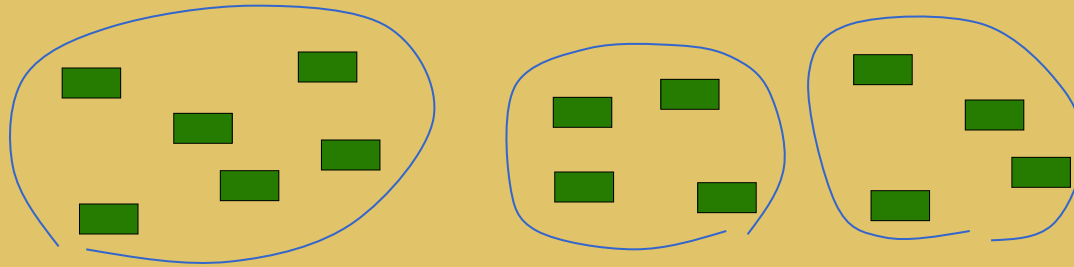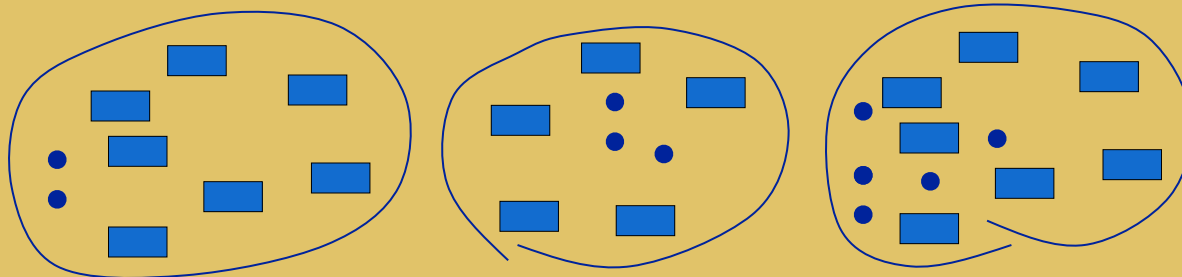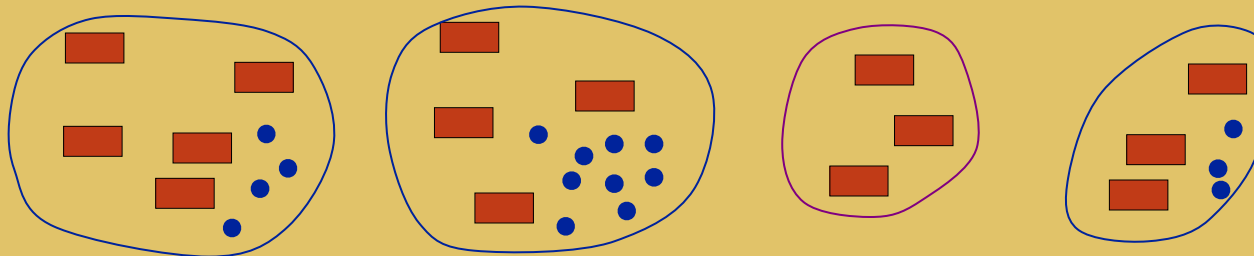
Team Review Workshop Secret Sauce

- It is very important to tackle each question one at a time and not jump around. The temptation for the group will be to skip straight to things ripe for improvement without spending enough time on the things that you are doing well.

- If the group is large then give each participant 3 dots to stick on the paper. If the group is small then give them 5 each. This is so visually there are enough votes on the paper.

Tools & Activities

Balanced Scorecard

Creative Problem Solving

ABC Avalanche

Association Flower

SCAMPER

Selecting Ideas & COCD Box

PPCO

RACI

Culture Triangle

Team Review Workshop

Open Space Technology

World Café

WorkshopBank

Objectives

- To tackle a large number of the most important / difficult issues facing a large group of people.

- To achieve shared ownership of not only the outcomes but also the process and the event itself.

Outcomes

- All the most important issues to those attending are included in the agenda.

- All the issues raised and worked on are addressed by the participants best capable of getting something done about them.

- All the most important ideas, recommendations, discussions, and next steps are documented in a resulting report.

- When the purpose requires, and time allows for it, the group can prioritize the issues addressed in the report.

- When the purpose requires, and time allows for it, the group can draft action plans for the highest priority issues.

When Would You Use It?

- Open Space works best when there are high levels of
    - Complexity (hard problems to solve)
    - Diversity (lots of different types of people needed)
    - Conflict (people really care about the issue)
    - Urgency (it has to be fixed as soon as possible)
- If you have a culture of distributed leadership in the organization / group.
- If management are willing to let go of the reigns and put trust in their people to find solutions to complex problems.
- When you are looking to reach a common understanding of a large group of people behind a complex problem.
- The nature of the format means a lot of view forming between peers happens on the sidelines. By the end of the session (you need at least 1 day) many of the participants will have shifted their views from where they started.

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When is Open Space a bad idea?

- When the problems aren't complex enough. Easy to solve problems rarely invoke enough passion in participants and when you have large numbers of people not caring enough your event can fall flat.

- When management have decided (or are close to deciding) the way forward. Almost anything can come out of an Open Space session and leadership must be willing to embrace whatever happens otherwise participants will feel their time has been wasted.

- When the organization has a top-down autocratic culture. Open Space is extremely democratic by nature but for it to work well the participants need to feel their views are being taken seriously.

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Why Would You Use It?

- Open Space is 'participant driven'. This means your participants have more control than usual input over the process and outcomes. What you get for that loss of control is high-levels of ownership in the results.

- If you are short on time in the preparation phase then OST will work well for you. You have to do very little process planning in the lead up because the participants do it for you on the day.

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Resources Required

- Depending on the size of your group you need a room (or rooms) large enough to host all your participants comfortably.

- Lots of chairs (no tables).

- One facilitator (at least) for each session.

Start-of-the-day Process

1. Gather your participants together and briefly explain how Open Space events work using Harrison Owen's 1 Law and the Guiding Principles as appropriate. Traditionally you should do this with everyone in a circle around you but you don't necessarily have to.

2. Ask participants to spend 10 minutes thinking through if they have any issues they'd like to raise.

3. You then invite participants to briefly explain their issues explain to the group.

4. If there is a general agreement that the issue has enough support and passion behind it invite the issue owner to add the issue to the schedule.

5. Once all issues have been added invite the participants to sign-up for the sessions they're planning on attending (they are free to change their mind later if they want to).

6. Your sessions start.

	9-10am	10-11am	11-12pm	1-2pm	2-3pm
Stream 1	How to raise corporate awareness?	How to use storytelling to improve relationships?	How to engage politicians?	How to involve the community?	How to balance work & home?
Stream 2	How to measure performance the right way?	How to bridge the funding gap?	How to be more creative?	How to get better equipment?	How to reduce employee churn?
Stream 3	How to increase perceived value?	How to stimulate our employees?	What leadership style should we adopt?	How to manage conflict situations?	What tools can we use to improve?
Stream 4	How should we make decisions?	How to create successful partnerships?	What can we do to feel more motivated?	How to manage issues & risks better?	What is our corporate vision?

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Process for a Session

1. Each session should be a round group of chairs (no table in the middle) with preferably one facilitator to lead the discussion and a scribe on the flipchart.

2. A session starts with the issue owner welcoming and thanking the group for coming and then giving a <u>brief</u> description of the issue as they see it.

3. The facilitator then leads the discussion inviting people to give their input at their request.

4. The scribe records the discussion on flip chart paper making sure to mark Issues, Ideas, Questions (that can't be answered today) & Actions. When a flip is finished they should tear it off and put it in the center of the circle or on a nearby wall for people in the group to see.

Process for a Session

5. Allow people to leave and arrive as they see fit though don't allow them to interrupt or slow-down your progress. It is a new arrival's responsibility to catch-up with the discussion using the flip chart outputs no matter how high up or important they are.

6. When the issue looks like it has been covered and there are no more inputs coming from your group thank them for their time and invite them to join other groups if the session time is not over.

Harrison Owen's 1 Law

If at any time during your time here you find yourself in any situation where you are neither learning nor contributing, use your two feet, and go somewhere else.

Guiding Principles

1) Whoever comes are the right people

2) Whenever it starts is the right time

3) Whatever happens is the only thing that could have
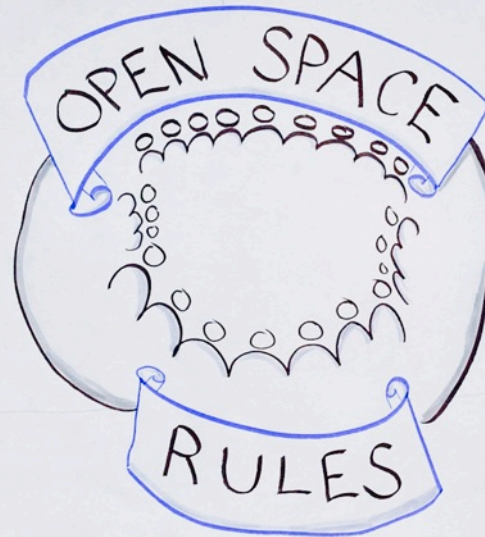
4) When it's over, it's over (in this session)

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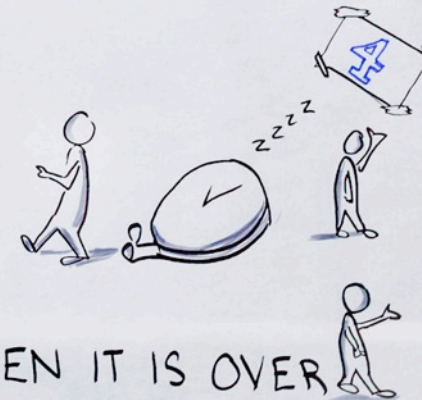
Guiding Principles

1) Whoever comes are the right people

This is to remind participants they don't need top management or lots of people to get things done. The only people it's important to have are those who feel passionately about the issue. And if they don't come then they're not passionate enough.

2) Whenever it starts is the right time

This is to remind participants that you are not late (or early for that matter) in discussing the issue at hand. Removing the feeling of anxiety allows the group to focus better.

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Guiding Principles

3) Whatever happens is the only thing that could have

This is to remind participants that whatever comes out of the discussion is the right thing. Once it's done, it's done and the only direction to move now is forward.

4) When it's over, it's over (in this session)

This is to remind participants that once they feel the issue has been resolved they should move on to the next one. There's no need to keep talking about the same topic just because there's still time left in the session.

Open Space Secret Sauce

- When you're setting the schedule before event, if you are running parallel streams (different groups looking at issues at the same time) try and put similar topics together at the same time. That way people can move between the groups freely and find the right discussion for them.

- You should stress to issue owners that they are expected to have lots of passion for their topic.

- Each issue owner must take responsibility for creating a report after the discussion has taken place so that all other participants can access the content at any time (otherwise you'll be left with carrying the responsibility).

Open Space Secret Sauce

- If the issue owner is the only one who shows up for their session that person can either use the session to think it through on their own, join another discussion, see if someone else who is running a session would like to join together, or drop the topic altogether.

- Try your best to have small groups of no more than 12 so those who want to speak are given plenty of opportunity.

- No single person should be allowed to dominate a session whether they are a facilitator or participant.

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Tools & Activities

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World Café

WorkshopBank

Objectives

- To help your participants have collaborative dialogue, engage actively with each other and create constructive possibilities for action.

ROBERTS

NETWORK

PARK

COFFEE SHOP

CANDY

DINOSAUR

WorkshopBank

When Would You Use It?

- The World Café is a discovery tool that helps a large group understand a set of issues at their own pace. It's great for helping people reach a state of common understanding and alignment.

- It's not a problem solving tool so keep your group away from creating solutions as much as possible (however tempting that might be).

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Design principle 1 – Set the context

- Focus on the reason you are bringing everyone together.

- Holding onto the purpose of your meeting helps you choose the most important elements to realize your goals: e.g. who should be there? What questions should be tackled?

Design principle 2 – Create hospitable space

- As the Café Host you must create a hospitable space - one that feels safe and inviting.

- You know yourself, when you feel comfortable, you do your best creative thinking, speaking, and listening.

- In particular, consider how your invitation and your physical set-up contribute. You're looking to create a welcoming atmosphere.

Design principle 3 – Explore questions that matter

- Find questions that are relevant to real concerns of the group.

- Powerful questions attract energy, insight, and action.

Design principle 4 – Encourage everyone's contribution

- Most people don't only want to participate, they want to make a difference through action.

- You should encourage everyone to contribute ideas, while also allowing anyone who wants to participate by simply listening to do so.

Design principle 5 – Connect diverse perspectives

- The unique process of asking people to move between tables and contribute their ideas whilst meeting new people is one of the distinguishing characteristics of The World Café.

- Prepared to be surprised for a flood of new insights from your group as the session progresses.

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Design principle 6 – Listen together for patterns & insights

- Encourage the group to listen for what is not being spoken along with what is.

- The quality of listening is one of the most important factors that determine the success of a Café.

Design principle 7 – Share collective discoveries

- The last step plenary of the World Café, often called the "harvest", involves surfacing any patterns so they are visible to everyone in a large group conversation.

- Invite a few minutes of quiet reflection on the patterns, themes and deeper questions from the smaller table conversations.

- Make sure you have a way to capture the harvest.

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Resources required

- 1.5 hours.

- Small round tables of about 1m diameter are perfect (40 inches).

- Enough chairs for all participants and presenters.

- White paper tablecloths to doodle on for each round table (or colorful tablecloths covered in large pieces of white paper).

- Colored water-based markers or crayons scattered on each table. Preferably dark colors so the results are easy to read.

- A side table packed with fruit and refreshments (to keep those energy levels up).

- Flip-chart to capture the final plenary discussion.

Café Etiquette

- Focus on what really matters

- Contribute your ideas & thinking

- Speak your mind and heart with humility

- Listen to understand

- Connect your ideas with others

- Play, doodle and draw – use your tablecloths to full effect

- Have fun!

Process

1. Setup small café-style tables in a rooms and seat 4 or 5 Participants at each. These are your 'conversation clusters'.

2. The Facilitator then explains to the group they will now have 3 rounds of conversation of approximately 20-30 minutes each.

3. Questions or issues that genuinely matter to your work, life or community are discussed while other groups explore similar questions at nearby tables.

4. The Facilitator encourages the table members to write, doodle, and draw key ideas on their paper tablecloths or to note key ideas on large index cards or placemats in the center of the group.

Process

5. After completing the 1st round of conversation, the Facilitator asks each table to agree a 'table host' who remains at the table while the others travel to different tables.

6. The travelers now get up from the table and move to another. They can go to whichever table they prefer carrying with them key ideas, themes and questions from their old table into their new conversations.

7. The Facilitator asks the Table Hosts to welcome their new guests and briefly share the main ideas, themes and questions from the initial conversation (max 2 mins). Encourage guests to link and connect ideas coming from their previous table conversations – listening carefully and building on each other's contributions.

Process

8. At the end of the 2nd round, all of the tables and conversations will be cross-pollinated with insights from previous conversations.

9. In the 3rd round of conversation, people can return to their home (original) tables to synthesize their discoveries, or they may continue on to new tables, leaving the same or a new host at the table.

10. An optional step is for the Facilitator to pose a new question that helps deepen the exploration for the 3rd round of conversation.

11. After your 3rd round of conversation, initiate a period of sharing discoveries and insights in a whole group conversation.

12. Make sure you have someone flipchart this plenary conversation so you capture any patterns, knowledge and actions that emerge.

World Café Secret Sauce

- Pay close attention to the reason you are bringing people together. Knowing the purpose of your meeting enables you to consider which participants need to be there and what parameters are important to achieve your purpose.

- You need to create an hospitable space – one that feels safe and inviting. When people feel comfortable to be themselves, they do their most creative thinking, speaking and listening.

- The question(s) you choose or that Participants discover during a World Café are critical to its success. Your café may explore a single question or several questions that support a logical progression of discovery.

World Café Secret Sauce

- Bounce possible questions off of key people who will be participating to see if they sustain interest and energy.

- Always choose a new Table Host at the end of each round - not at the beginning (the same person should not be a Table Host for more than one round).

- There are no facilitators in a World Café, only hosts. Everyone at the tables is responsible for hosting themselves and each other.