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Workshop Tactics®

Volume I

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Instructions

1. Read the **Workshop Strategy System** card to help you determine which tactic to use.
2. Read the suggestions at the bottom of each card. You may find there is a tactic that would be good to run beforehand, or afterwards.
3. Follow the steps on the back of the card.
4. Check out the 📅 **Session** cards. They suggest ways to string multiple tactics together to make a longer, more in-depth workshop.



Tip: give the deck — or one tactic in particular — to a group so they can self-facilitate.

Join the Pip Deck community

Get help planning and running tactics, and learn from others building products and leading teams.

[*pipdecks.com/community*](https://pipdecks.com/community)

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Workshop Strategy System

Do you know clearly what your team is working towards?

No →



Goals

Yes



Do you know the biggest problem you face?

No →



Understand

Yes



Are you able to articulate your problem clearly?

No →



Frame

Yes



Do you have a range of ideas on how to solve it?

No →



Ideas

Yes



Have you assessed if your ideas are robust?

No →



Evaluate

Yes



Have you decided which ideas to test?

No →



Decide

Yes



Make a prototype and test it!



Goals

Agree on a desired end-state to work towards, so daily activity is moving you in the right direction.



Understand

Unpack problems and discover insights with critical and analytical thinking exercises.



Frame

Articulate your problem or experiment in a clear way, making it easier to start solving or testing.



Ideas

Encourage people to come up with lots of ideas, then refine and develop the best.



Evaluate

Assess problems or ideas against certain criteria to understand them better.



Decide

Prioritise ideas or problems based on your needs in order to decide what to focus on.



Discuss

Facilitate discussion to reach a shared understanding so you can move towards your goals.



Technique

Core techniques for planning and facilitating successful workshops.



Team Time

Give a new team the best chance of success.

Remember the archaeological TV show Time Team? Well, this is pretty much nothing like that, but it will help you unearth the ingredients of an effective team.

This session gives your team a common goal and ensures everyone knows their role. It will help everyone learn how they can best work together, as well as building a picture of who else might influence the team.

Visit pipdecks.com/teamtime for tips on building and growing an effective team.

Team Time

1.  **Newspaper Headline**
Get the team's imagination flowing and set an aspirational vision to work towards.



2.  **Sailboat**
Find out what is driving your team, and what may stop you achieving your vision.



3.  **Roles and Responsibilities**
Establish the roles in the team, and what each member does, discusses and decides.



4.  **Skills Market**
Understand what skills each team member has so you can work better together.



5.  **Stakeholder Map**
Understand all of the people who have a level of power and interest with your team's project.





Project Kick-off

Get your new project off to the best start.

There are a hundred and one ways to kick-off a new project. This session helps you to get everything out on the table, prevent problems before they happen, and lets your team work out where to focus first.

Before this session, if you are a new team try running  **Team Time**.
After this session, once you have your Hypothesis Statement, start generating ideas with  **Idea Storm**.

Project Kick-off

1. Premortem

Identify problems before they happen, and make a plan to prevent them from happening.



2. Problem Statement

Frame the problem the project aims to solve, and what the measures of success will be.



3. Assumption Collecting

Gather all of the team's user and business assumptions about the problem.



4. Assumption Map

Prioritise your most unknown and riskiest assumptions, to give the project the right focus.



5. Hypothesis Statement

Frame your prioritised assumptions as experiments that will put them to the test.





Idea Storm

Put a problem through its paces by gathering lots of ideas, then narrowing down and evaluating them.

This session takes you through the gears of idea generation. It makes a blank piece of paper far less scary for your team, and ends with a short list of clearly communicated ideas that have been evaluated to ensure they are robust.

Before this session, ensure you have a problem to solve. You may uncover one from tactics like  *Sailboat* or  *Five Whys*. Afterwards, prioritise your ideas with  *Impact Effort Map*.

Idea Storm

1. How Might We...

Frame your problem as a question to get the group into a solution mindset.



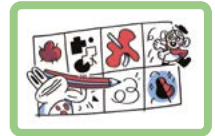
2. Mind Map

Free associate around the question to warm up the creative mind.



3. Crazy Eights

Using your Mind Map as a prompt, generate lots of ideas and share them with each other.



4. T-Bar Format

Develop your ideas further by drawing them up into this format, which also makes them clearer.



5. Rose, Thorn, Bud

Evaluate each idea together, to see how it could be improved, or what might stop it from working.





Design Dash

Get your team from blank faces to a testable solution in a couple of days.

Spanning over two days, this focused period of time helps your team quickly identify the biggest opportunity or problem to solve. Then — generate ideas to solve it and develop the most promising idea into a prototype to test.

Visit pipdecks.com/designdash for tips on running Design Dash, as well as advice on how to prototype and test your ideas.

Design Dash

1. Journey Map

Map out your user or customer's journey to identify opportunities for improvement.



2. Idea Storm

Generate lots of ideas, then short-list and evaluate your best ones to take forward.



3. Priority Map

Prioritise the best ideas by two criteria such as Impact vs. Effort or Cost vs. Value.



4. Storyboard

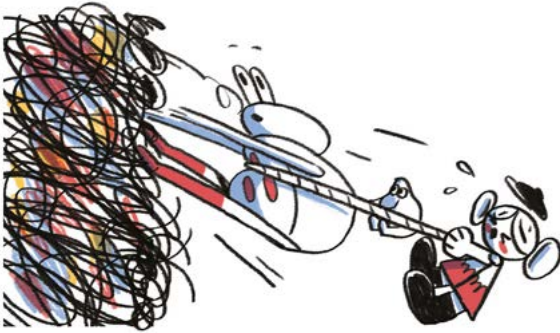
Take the winning idea and expand on it further by turning it into a storyboard sequence.



5. Make it and test!

Now's the time to take your fully fleshed-out idea and create a prototype to test it!





Get Unstuck

A way of probing a team or project to figure out what's going wrong.

Sometimes it can feel like you're stuck. This session critically assesses what's going wrong and helps you find out what your options are to get unstuck, before agreeing on a viable solution.

Visit pipdecks.com/unstuck for tips on how to solve seemingly complex or insurmountable problems.

Get Unstuck

1.  **Sailboat**
Find the biggest barrier that's stopping you from achieving your goal.
2.  **Five Why**
Ask 'why?' five times to find the root cause of that barrier.
3.  **How Might We...**
Frame the problem you discover in a way that invites a range of solutions.
4.  **Reverse Brainstorm**
Generate ideas to make that problem *worse*, then reverse them to find a solution.
5.  **Rose, Thorn, Bud**
Evaluate your solution to see if it holds up, before you go off and test if it will work.





Retrospective

Look back on successes and failures in order to learn and improve for next time.

This session is a staple of productive teams. Normally conducted every fortnight, it's a chance to look back and reflect on what's gone well and what hasn't — and what can be done about it.

Visit pipdecks.com/retro for tips on how to run great retrospectives and embed them into your team's way of working.

Retrospective

1. Pick a retrospective format:

-  **Mad, Sad, Glad**
Focus on how the team is feeling.
-  **Three Little Pigs**
Focus on how robust aspects of the team or project are.
-  **Start, Stop, Continue**
Focus on action-based constructive feedback.



2. Democratic Discussion

Facilitate a discussion that doesn't lose track for each of the most popular points raised.



3. Who, What, When

To make the retro worthwhile, create an actionable to-do list from the discussion.





Sailboat

Find out what your goals really are, the reasons behind them and what's stopping you from achieving them.

This exercise brings together teams and stakeholders to gain a shared understanding of their goals, drivers and barriers. You can find out what is slowing you down, or if the purpose or goals are not quite right.

This tactic requires you to  **Theme Sort** as you go. Follow up this session by framing your barriers with  **How Might We...**

Sailboat

1. On a large surface, draw a boat out at sea — this boat represents the team or the project.
2. Next, draw an island — this represents the goal. Ask the group to write down what they believe the team or project's goals are on sticky notes.
3. Ask each member to share what they've written as you  **Theme Sort** them near the island.
4. If you haven't already, draw a sail on the boat. Explain that this represents what's driving you towards your goal. Ask the group to write down the drivers.
5. Share and  **Theme Sort** them near the boat.
6. Draw an anchor coming from the boat. Explain this represents the barriers to the goal. Ask the group to write down what's slowing or stopping you achieving the goals.
7. Share and  **Theme Sort** them near the anchor.
8.  **Blind Vote** the goals to get an understanding of what everyone believes is most important to work towards.
9. Finally,  **Blind Vote** the barriers to understand what the most important problem to solve is.



Newspaper Headline

Think about the company or a project's future by predicting what the press might say on their front pages.

Giving everyone a chance to dream about the future brings to light the true goals of the organisation. From the predictions, you start to define the problems to pursue and which direction to move in.

Try out  **G.R.O.W** or  **Sticky Steps** after this tactic to give you a clearer idea of how you are going to achieve your grand future vision.

Newspaper Headline

1. Get each person to draw the template below on a portrait piece of paper.
2. Tell the group they are going to predict the future. Explain each section and ask them to complete it.
3. Once complete, encourage everyone to share their future vision. Try to find common themes and reflect on how these might be condensed into one common goal.

Break down your predictions as follows:

Headline: Describe the extraordinary success of the company in one catchy, attention-grabbing headline.

Subheading: Reveal more of what the story is about.

Sketch: Draw something that supports the headline.

Report: In bullet points, detail the highlights of the story.

Quotes: Include some fictional quotes from people about the accomplishment.

<i>Headline</i>	
<i>Subheading</i>	<i>Quotes</i>
<i>Sketch</i>	
<i>Report</i>	



Sticky Steps

Start with your goal and work backwards to give you a clear path to get there.

With a clear step-by-step plan, you can turn seemingly unachievable or difficult goals into tangible realities.

Prior to this tactic, ensure you have a clear goal by running  **Sailboat** or  **Newspaper Headline**. Afterwards, try  **Who, What, When** to get clear steps on how the plan is going to be actioned.

Sticky Steps

1. Start by writing the goal as far right as your drawing surface allows. The goal is you or your team's desired end-state.
2. Ask the following question to the group: ***“What would have to happen just before this for us to succeed?”***
3. Put the answer on a sticky note to the left of the goal.
4. Ask the same question again for the sticky note you've just placed: ***“What would have to happen just before this for us to succeed?”***
5. Repeat this process until you have stepped all the way back to today.
6. Make a plan for how you can start on the first thing you need to do.

Tip: as you step backwards through your plan, you might find certain steps that need to happen simultaneously. This may cause your plan to split and branch out to two paths running side by side.

This is fine, but at all times try to consider if each step is absolutely necessary to achieving the desired end-state. The more linear your path, the easier it will be to achieve your goal.



G.R.O.W

Create a plan for how to achieve a specific goal.

This exercise helps you set a goal in the context of where you are now, what obstacles you face, and what tangible things you can actually do to achieve it.

Fun fact: the word ‘tangible’ comes from 16th century Middle French, and means “capable of being touched” – a bit like these lovely cards. Go on, stroke one.

Prior to this tactic, ensure you have a clear goal by running  **Sailboat** or  **Newspaper Headline**. Use  **Who**, **What**, **When** for the last part of this tactic to help you commit to the actions.

G.R.O.W

1. Create four columns on a large surface and write Goal, Reality, Options and Will as headings.
2. Agree on a Goal and write it in the first column. Do this by writing in silence on sticky notes. Then  **Theme Sort** and  **Blind Vote**.

Is this goal targeting a specific area? How will we measure progress towards this goal? Is the goal assignable (who is going to do it)? Is it realistic with the resources we have? Is the goal time-limited? When do we want to see results?

3. Do the same for ‘Reality’ by answering the following:

What is our starting point? What is happening now (what, who, when and how often)? What is the effect or result of this? Have we already taken any steps towards the goal? Does this goal conflict with any other goals or objectives that we have?

4. Explore the ‘Options’,  **Crazy Eights** is a helpful tactic to generate lots of ideas quickly.

What else could we do? What if certain constraints were removed? Would that change things? What are the advantages and disadvantages of each option? What factors or considerations will we use to weigh the options? What do we need to stop doing in order to achieve this goal? What obstacles stand in our way?

5. Establish ‘Will’ by committing to action some of the options. Use  **Who**, **What**, **When** to help you clarify.



Objectives and Key Results

Create radical focus for your team by agreeing on an objective and actively measuring progress towards it.

The problem with most goals is that distractions get in the way of achieving them. The OKR framework is designed to give you “radical focus” on achieving an objective. It can be used personally, within a team, or at an organisational level.

Visit pipdecks.com/okr for more advice on how to continue using OKRs after you've created them with your team.

Objectives and Key Results

1. Before the meeting, invite everyone to submit their top objective for the team to achieve in the next quarter. An objective is a qualitative and aspirational “end-state”. For example, *launch the best possible version of Workshop Tactics beta*.
2. Put each objective on a sticky note, put them up on a wall and then 🖐️ **Theme Sort**.
3. Debate and use 🖐️ **Blind Vote** to determine your primary objective. Having two objectives defeats the purpose of “radical focus”.
4. List as many metrics as you can in 10 minutes. They should show you're closer to achieving the objective. For example: *Number of pre-orders, proof-reading rounds, positive feedback received*.
5. Use 🖐️ **Theme Sort** and 🖐️ **Blind Vote** to group and decide on three metrics.
6. Turn your three metrics into Key Results by setting specific, quantitative targets. For example: *Get x pre-orders a month, proof-read by x different people*.
7. Agree on specific numbers for each Key Result. You should feel like you have a fifty-fifty chance of achieving each one in the next quarter. For example, *Get 40 pre-orders a month (5/10)*.



Five Whys

When faced with a problem that is affecting a project, channel your inner inquisitive toddler and ask “why?” five times to get to the root cause.

By identifying the root cause, you don’t waste time solving superficial problems. This is best conducted after an unexpected event or challenge.

Try uncovering problems with  *Journey Map* or the barriers from  *Sailboat*. Works well with  *Who, What, When* to follow up actions at the end of the session.

Five Whys

1. Invite all affected parties to the meeting.
2. Select a meeting leader to lead the discussion.
3. Ask “why?” five times. Include the previous answer in the question to keep a narrow focus on the problem.
4. Use  *Who, What, When* to assign responsibility for putting solutions into action.

An example from Toyota:

“Why did the robot stop?”

The circuit has overloaded, causing a fuse to blow.

“Why is the circuit overloaded?”

There was insufficient lubrication on the bearings, so they locked up.

“Why was there insufficient lubrication on the bearings?”

The oil pump on the robot is not circulating sufficient oil.

“Why is the pump not circulating sufficient oil?”

The pump intake is clogged with metal shavings.

“Why is the intake clogged with metal shavings?”

Because there is no filter on the pump.



Hopes and Fears

Understand your team's expectations and hesitations so you're all on the same page before you take flight on a new journey.

What you learn from this tactic can help you adjust how you proceed. For example, you may find everyone has completely different expectations, or everyone has the same fear. In any case, gaining this shared understanding helps you start a constructive discussion on how to move forward.

If your team doesn't yet have a clear goal or direction, an alternative tactic to try is  **Sailboat**.

Hopes and Fears

1. On a large surface, create two columns. One titled "Hopes" and the other, "Fears".

Hopes

Fears

2. Frame a topic such as the current project, a goal or even the workshop itself.
3. Ask the participants to spend five minutes writing their hopes and fears on individual sticky notes.
4. One by one, invite each participant to share their hopes and fears, sticking them in the relevant column.
5.  **Theme Sort** as each participant puts up their sticky notes.
6. Create a  **Democratic Discussion** about how to reduce or remove fears.
7. Use  **Who, What, When** to capture any actions from the discussion.



Assumption Collecting

Collect assumptions that reflect what you and your team think might be true about the project.

Declare assumptions at the start of the project so that you can identify risks. Having everyone's assumptions visible early removes any surprises later on.

Try running  **Problem Statement** beforehand to give you a clear problem to start unpacking your assumptions from. Afterwards, prioritise your riskiest assumptions with  **Assumption Map**.

Assumption Collecting

1. Ensure the workshop includes the project's key stakeholders. Try  **Stakeholder Map** beforehand to help you invite the right people.
2. Get everyone to answer the following questions on sticky notes and  **Theme Sort** them as they are completed. If needed, rewrite the questions to make them relevant to your project.

Business assumptions

- I believe my customers have a need to...
- These needs can be solved with...
- My initial customers are (or will be)...
- The #1 value a customer wants to get out of my service is...
- The customer can also get these additional benefits...
- I will acquire the majority of my customers through...
- I will make money by...
- My primary competition in the market is...
- We will beat them due to...

- My biggest product risk is...
- We will solve this through...
- What other assumptions do we have that, if proven false, will cause our business or project to fail?

User assumptions

- Who is the user?
- Where does our product fit in her work or life?
- What problems does our product solve?
- When and how is our product used?
- What features are important?



Journey Map

Identify areas of improvement in a user's experience by creating a map of it.

By mapping the steps of your service or product, you can start identifying your user's level of frustration or delight at any given stage. Doing this helps you see how the experience can be improved by making frustrating steps more delightful.

Prior to this tactic, observe your users using your product or service. Afterwards, if you have a lot of  **How Might We...** questions then use  **Impact Effort Map** to help you focus on what's important.

Journey Map

1. Draw the following on a large surface:

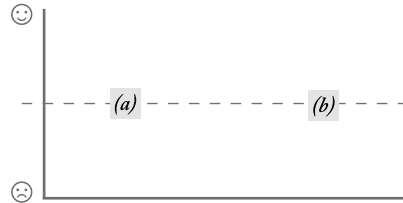


fig. a) Sticky note with the first moment the user interacts with your product or service. For example, visits pizza website.

fig. b) Sticky note with the final outcome your user is aiming for. For example, eating pizza.

2. Instruct the group to write on sticky notes the steps the user takes before, inbetween and after the two points.
3. Collect and put all the sticky notes along the dashed line in the correct order they occur.
4. Together, discuss each sticky note and decide it's position along the y axis based on how delightful or frustrating that step is.
5. Write  **How Might We...** questions for the most frustrating or least delightful steps inbetween the start and end points.



Service Map

Create a map of a service to understand it better, and identify opportunities for improving processes.

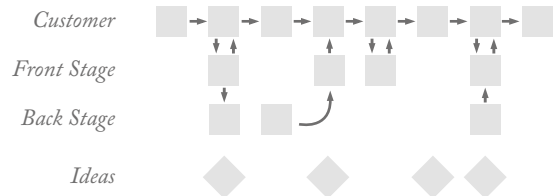
A service map communicates the front and back stage actors in a service. Understanding how all these actors interact with each other, and ultimately the customer, can reveal bottlenecks or areas for improvement.

Try running  **Journey Map** beforehand, as it will help you with the first part of this tactic. Afterwards,  **Impact Effort Map** your ideas to decide which to take forward.

Service Map

1. Find a large surface and mark out space for four rows.
2. **Customer:** on sticky notes, write the steps your user takes in a typical scenario. For example: *presses button, waits, enters elevator, avoids eye contact with other humans, etc.*
3. **Front stage:** on the second row, write what visible things the user interacts with at each step of your service. For example: *an elevator button, floor level indicator, the interior of the lift.*
4. **Back Stage:** on the third row, for each step — write what happens behind the scenes that the customer doesn't see. For example, *an elevator descending.*
5. **Ideas:** review the map with the group and identify opportunities to improve parts of the service. Capture these ideas on their own row at the bottom.

Tip: it can help to draw arrows to signify the flow of interaction between different layers.





Empathy Map

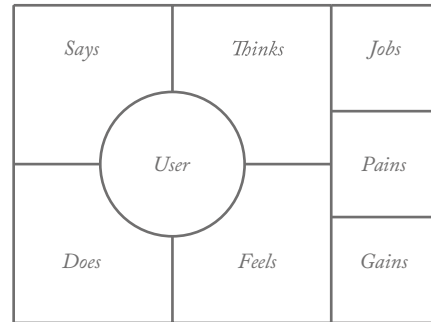
Empathise with your audience so you can make better design decisions.

Getting people into the mind of the person they are solving a problem for impacts the solutions and ideas people come up with. And encouraging people to cultivate empathy in general might just help make the world a tiny bit less scary and divided than it sometimes seems.

Try  **Problem Statement** beforehand to give you a clear problem to help you define your user's goal. Afterwards, try putting your biggest assumptions about your user on to an  **Assumption Map**.

Empathy Map

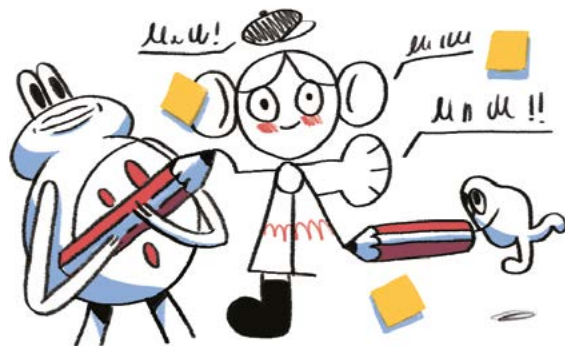
1. Draw the following on a large surface:



- Write the goal of the user in the middle. For example, "buying a TV".
- Ask the group to spend ten minutes writing their assumptions on sticky notes for each section.

What is the user saying, thinking, doing, feeling about their goal?
What jobs does the user need to do? E.g., keep the kids entertained.
What pains do they have achieving their goal? E.g., too much tech jargon.
What do they stand to gain from their goal? E.g., peace and quiet.

- Ask each participant to stick up and talk through their assumptions.  **Theme Sort** as you go.
- Use  **Assumption Map** to decide which assumptions about your user you need to validate first.



Prototype Persona

Try to predict who is using (or will use) your product and why, so you can start testing with the right people.

Creating personas helps you start thinking about who you are designing for, and why. Even if you are totally wrong about your predictions, a “proto-persona” gets your assumptions about your user on paper. Differing from *Empathy Map*, this tactic gets you straight from problem mode to solution mode.

This tactic works well with  **Hypothesis Statement** and  **Empathy Map** beforehand to help you understand your target audience better. Your persona will evolve as you learn more about your user.

Prototype Persona

1. Explain each section of the persona template:

Sketch & name

Give life to your persona with a rough sketch of their face, along with their name and role.

Behavioural demographic

Write demographic information about your user’s behaviour. For example, *they live in the countryside and so are less likely to use ride hailing apps.*

Pain points & needs

Capture the user’s needs and frustrations with their current situation. Try and be specific about the pain points your product is trying to solve, or the opportunity you’re trying to address.

Potential solutions

Either written or sketched, generate ideas for those needs. These ideas can also be used in your  **Hypothesis Statement.**

2. Distribute paper and pens, and ask the group to individually create as many personas as you can using the template.

1 <i>Sketch & name</i>	2 <i>Behavioural demographic</i>
3 <i>Pain points & needs</i>	4 <i>Potential solutions</i>



Stakeholder Map

Identify a project's stakeholders. Anyone who can significantly impact a decision, or who may be impacted by it, needs to be considered.

Deciding who has what level of input and interest in a project can help to align decisions appropriately. A stakeholder map helps you develop an effective strategy to communicate with the relevant people and manage their expectations.

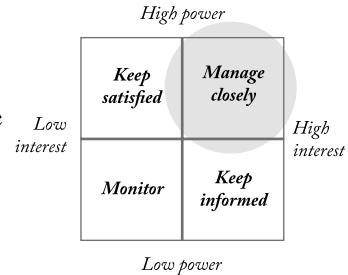
Use  **Priority Map** to help you with this tactic. Consider using  **Democratic Discussion** to help facilitate the last part of this tactic.

Stakeholder Map

1. Create a  **Priority Map** with Power and Interest on the two axes as follows:

Power: a stakeholder's level of influence in the system—how much they can direct or coerce a project and other stakeholders.

Interest: the degree to which a stakeholder will be affected by the project.



2. Create a list of stakeholder groups by answering the following questions:
 - Who will be impacted by the project?
 - Who will be responsible or accountable for the project?
 - Who will have decision authority on the project?
 - Who can support or obstruct the project?
 - Who has been involved in a project like this before?
3. Together, map the list one stakeholder at a time on the grid, based on their relative power and interest.
4. Discuss specific strategies for each stakeholder:
 - Who needs to be informed of what, and when?
 - Who needs to be consulted about what, and when?
 - Who is responsible for engaging each stakeholder?



Roles and Responsibilities

Understand each other's roles better, and learn who is responsible for what.

Defining clear responsibilities prevents confusion around hierarchy and expertise. It reduces duplicate work and promotes better collaboration.

Running  **Skills Market** beforehand will help a new team get to know each other. Works well with  **Stakeholder Map** for giving your team a clear picture of each other and those around them.

Roles and Responsibilities

1. On a large surface, such as a whiteboard, create a column for each discipline within the team. For example: *Designer, Developer and Product Owner*.
2. Create three rows: *Do, Discuss, Decide*.
3. On sticky notes, to build empathy — ask each person to complete the three rows for the discipline of the person sat to their left:
 - Do:** what are the core activities of their discipline?
 - Discuss:** what do they discuss with the wider team?
 - Decide:** what are they responsible for deciding?
4. In turn — stick up, share and discuss what has been written down.
5. Repeat steps 3 and 4, but this time with the participant's own discipline to help create clarity.
6. As a group, move, refine and add sticky notes until everyone is happy with the roles and responsibilities.

	<i>Designer</i>	<i>Developer</i>	<i>Product Owner</i>
<i>Do</i>			
<i>Discuss</i>			
<i>Decide</i>			



Skills Market

Learn about each other's skills, abilities and ambitions, so you can understand how to help each other grow.

Gain a broader picture across teams of the skills and abilities you have access to, and also where people would like to improve. This encourages a culture of learning and improvement, as well as creating connections where collaboration can happen.

Follow up this session with  **Roles & Responsibilities** for giving your team a clear understanding of each other's role.

Skills Market

1. Tell everyone they are in a market, setting up a stall to buy and sell their skills.
2. On large pieces of paper, invite each participant to draw their own market stall with room for these three sections:
 - Current skills (*that allow me to do my job*)
 - Hidden skills (*you might not know I have*)
 - Desired skills (*I want to develop or learn*)
3. Remind the participants that the creative design of their market stall isn't under judgement. Encourage them to get creative with how they draw it, as long as they leave enough room to write their skills.
4. Invite the group to independently spend some time completing each section of the stall.
5. Once complete, get each participant to stick up their skills market on a wall so its visible to the group.
6. As a group, visit each skills market and allow the marketer to share their wares. As each participant shares their market stall, encourage others to leave their initials next to the skills they can help the marketer develop, or the skills that they want to 'buy' and develop themselves.

7. Capture actions with  **Who, What, When.**



How Might We...

Transform a problem or observation into a solvable question.

A problem on its own can seem daunting. Rephrasing problems as questions is a powerful way to switch the mind from panic mode to solution mode.

“How Might We...” questions are best used after  **Theme Sorting** problems or challenges from tactics like  **Sailboat**,  **Five Whys**,  **Journey Map** or  **Premortem**.

How Might We...

1. Gather information about the problem you are solving. This can be in the form of interviewing an expert on the problem, or presenting research findings to the group.
2. Inform the group that as the interview or research playback happens, they should write down any problems they hear as **How Might We...** questions on sticky notes.
3. Explain how to write a **How Might We...** question: rephrase a problem you hear as a question, so that it asks for a solution. For example:

Problem: *customers aren't contacting us when they have an issue with our product.*

Question: *How might we get customers to contact us when they have an issue with our product?*

Tip: *ask yourself if your question allows for a variety of solutions. If it doesn't, broaden it.*

4. Invite the group to stick all of their notes on a wall, and then  **Theme Sort** to find common themes.
5. Prioritise the questions with  **Priority Map**.
6. Use the  **Crazy Eights** or  **Reverse Brainstorm** tactic to generate ideas for solving your problems.



Problem Statement

A statement that captures the project's goals, problems, and measurable success criteria.

A problem statement gives your team a clear focus for their work. It also defines any important constraints. You need constraints for group work as they provide guardrails that keep the team grounded and aligned.

Prior to this tactic, try uncovering problems with 🧠 *Journey Map* or the barriers from 🚢 *Sailboat*. Afterwards, try unpacking your Problem Statement with 🧠 *Assumption Collecting*.

Problem Statement

1. Invite stakeholders to this session to make sure you're all agreeing on the same problem to tackle.
2. On sticky notes, answer the following questions and 🖐️ *Theme Sort*.

- *What are the current goals of the product or system?*
- *What problem does the stakeholder(s) want addressed?*
- *Which goals aren't being met?*
- *What is the explicit request for improvement that doesn't dictate a specific solution?*

3. Complete the following template from the group's answers. Discuss and amend until everyone is happy with the problem statement.

[Our service/product] was designed to achieve [these goals].

We have observed that the product/service isn't meeting [these goals], which is causing [this adverse effect] to our business.

How might we improve [service/product] so that our customers are more successful based on [these measurable criteria]?



Hypothesis Statement

Treat your assumptions as experiments by turning them into testable hypotheses.

Take the subjective and political conversation out of the decision-making process, and focus the team towards feedback from users and customers.

Before this tactic, collect and prioritise your assumptions with  **Assumption Collecting** and  **Assumption Map**. Afterwards, create a  **Prototype Persona** to give you direction on who to test with.

Hypothesis Statement

1. As a group, put your riskiest and most unproven assumptions into this hypothesis template:

*Because we saw [quantitative/qualitative insight]
We believe [this assumption statement is true].*

We will know we're [right/wrong] when we see the following feedback:

*[Qualitative feedback] and/or [quantitative feedback]
and/or [key performance indicator change].*

2. Your hypothesis may be too big to test with a single statement, so it can be helpful to use this format to break it down into smaller parts:

*We believe that [doing this/building this feature/
creating this experience] for [these people/personas] will
achieve [this outcome].*

*We will know this is true when we see [this market
feedback, quantitative measure, or qualitative insight].*

3. Get the group to  **Blind Vote** on the hypotheses they'd like to commit to.



Value Proposition

Clearly articulate the point of your service or product, who it's for and what makes it unique.

A value proposition is a statement that answers the 'why' someone should do business or work with you. It is your unique identifier. Without it, people don't have a reason to work with you over somebody else.

Prior to running this tactic, uncover information about your target audience with  **Empathy Map** or  **Prototypa Persona**.

Value Proposition

1. On sticky notes, have the participants independently write the answers for each section below.

Target customer: write a descriptive name for your target customer. For example, *aspiring facilitators*.

Statement of need: Write a statement that articulates the target customer's core need. For example, *needs reliable and uncomplicated workshop guides*.

Product/service name: What is the name of your product or service? For example, *Workshop Tactics*.

Product description: What is your product or product category? For example, *a curated set of workshop exercises*.

Statement of benefit: The intrinsic benefit for the customer, that also communicates your uniqueness. For example, *helps you run the right workshop at the right time*.

2.  **Theme Sort** and  **Blind Vote** each section.

3. Assemble the winning answers into this template:

For [target customer] who [statement of the need], our [product/service name] is a [product description] that [statement of benefit].



Mind Map

Turn all your thoughts into an interconnected map so you have stimulus for idea generation.

Filling a page with ideas is hard. Starting with one thing and letting ideas branch off can lead to new and unexpected pathways. This exercise is a great way to warm up everyone's creative minds (and it's a fun window into the different ways people think).

Before you start, give focus to your Mind Map by framing your problem as a  **How Might We...** question. Mind Maps are a good warm up prior to  **Crazy Eights**. They help ideas come more easily.

Mind Map

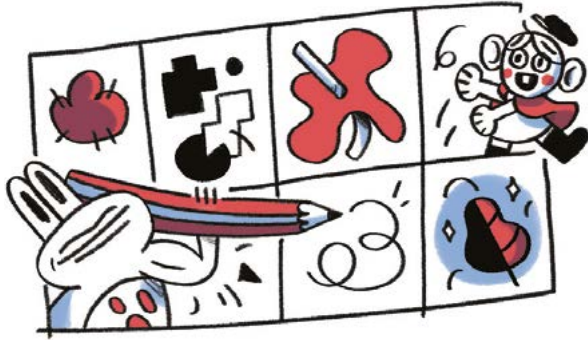
1. Distribute paper and marker pens to the group.
2. Ask the group to write the topic or question to be explored in the middle of their paper.

*Tip: consider using the  **How Might We...** question format as a starting point.*

3. Give a time limit of 10 minutes for the group to write down anything that comes to mind on that subject.
4. Follow up immediately with  **Crazy Eights** to take advantage of a creatively warm brain!

Tips to help the group succeed with this tactic:

- *This is an exercise in dumping everything in your brain on to paper, and letting any associations naturally occur.*
- *You don't need to try and think of ideas at this stage; just let your mind wander and write down what comes to you.*
- *It can be helpful to draw lines between any ideas that connect to help spur more thoughts.*



Crazy Eights

Generate a lot of ideas, quickly. Eight crazy ideas in eight minutes!

Sometimes, to be truly creative, our brains need structure and rules. By restricting space and time, but letting everyone know that anything goes — this tactic forces ideas out, fast. It's far less painful than it sounds.

Create a  **Mind Map** beforehand to make running this tactic much easier. This also works well with  **Prototype Persona**. Follow up this tactic by prioritising your ideas with  **Impact Effort Map**.

Crazy Eights

1. Get everyone to take a piece of paper and fold it three times to make a grid of eight rectangles.

*Tip: it can be helpful to write the pains and needs in each box from  **Prototype Persona** to help prompt ideas.*

2. Make sure everyone understands the problem that you are solving. This can be in the form of a  **How Might We...** question.
3. Have a timer ready and explain that everyone will have one minute per crazy idea (one idea per box). Ideas can be written or drawn.
4. Start the timer and encourage the group to move to the next idea as each minute as it passes. The pace might feel uncomfortable, but that's the point!
5. At the end of the eight minutes, ask each person to talk through their ideas. Encourage the group to steal each other's ideas for the next step.
6. Do the exercise again, or ask the group to put their top two or three ideas into the  **T-Bar Format**.
7. Ask each participant to present their final ideas to the group.



Round Robin

Evolve each other's ideas quickly.

You already have a rough outline of an idea but you want to develop it further. Thinking of what the next “version” of the idea is will help evolve it into a more robust and fully-formed solution. Collaboration doesn't get more ruthlessly efficient than this.

Works well with  **Crazy Eights** beforehand to get initial ideas before evolving. Try  **Idea Beetle** or  **Rose, Thorn, Bud** afterwards to evaluate and improve your best ideas together.

Round Robin

1. Give each person a large sheet of paper. Ask them to fold their piece of paper so that it is divided into four equal sections.
2. With the paper in portrait, ask the group to write the name of their idea and the problem it solves at the top.
3. Give them 5 minutes to draw their idea in the top left box with enough detail that someone can understand it without explanation.
4. Afterwards, instruct everyone to pass their paper to the person on their left.
5. The next person should look at the previous idea and develop it further, drawing their version in the next section of the paper. Additionally, they can include a statement about why the previous idea would fail.
6. Carry on doing this until all the sections of the paper are full.
7. Put the final ideas into a  **T-Bar Format** and present them back to the group.
8. Decide which ideas to evaluate with  **Blind Vote**. If you have a lot of ideas, consider prioritising them with  **Impact Effort Map**.



Storyboard

Draw your idea as a sequence of moments and real world interactions to better understand how it works.

One day, a team had a cool new idea, but it was hard to explain to others, and still not entirely clear to them. So they grabbed Workshop Tactics to figure out what to do. The answer was clear: sketch a storyboard to put it in context and get everyone on the same page. This worked a treat, and they were soon ready to progress.

Get initial ideas with  **Crazy Eights** beforehand. Afterwards, try evaluating your storyboard with  **Idea Beetle** or  **Rose, Thorn, Bud**.

Storyboard

1. Consider the minimum amount of frames you need to communicate your idea. To do this, plot out the key steps in the user's journey. For example: 1) *opens Workshop Tactics*, 2) *reads the Workshop Strategy card*, 3) *picks a tactic*, 4) *runs a successful workshop*.
2. Once you have your key steps plotted out, start sketching out the scene of the first step.

Tip: if in a group, delegate someone to draw. Ask the rest of the group to articulate what should happen in each scene. It doesn't need to be pretty; it just needs to get the point across.

3. When you're done, it can be helpful to write a brief description underneath each frame. A sentence or a few words will do.
4. Evaluate your idea as a group by asking:
 - Does it make sense?
 - What could be improved?
 - What isn't needed?
 - What's missing?

Tip: it can be helpful to take a break and come back to these questions with fresh eyes.

5. Alternatively, you can use  **Rose, Thorn, Bud** or  **Idea Beetle** to evaluate your storyboard.



Reverse Brainstorm

Think of the worst, most despicable ideas possible, then reverse them to find a solution.

This exercise leads to absurd suggestions, which can give you ground-breaking solutions when reversed. Try asking people for things that would get you all fired if you really want their most despicable ideas.

This tactic works well with  **Crazy Eights**. It's a good idea to have a  **Problem Statement** or  **How Might We...** beforehand, so you have a clear starting point. Follow up this tactic with  **Rose, Thorn, Bud**.

Reverse Brainstorm

1. Identify and write down your problem or  **How Might We...** question on a large surface so it's clear for everyone to see.

2. Reverse the problem, for example:

***Problem:** How might we increase customer satisfaction?*

***Anti-problem:** How might we increase customer dissatisfaction?*

3. Run  **Crazy Eights** to generate ideas for the anti-problem.

4. After sharing the ideas, collect them and randomly distribute the anti-ideas back amongst the group.

5. Ask the group to reverse the ideas they've been given. These will now become real solutions for the actual problem. For example:

***Anti-solution:** Not returning customer calls immediately upon a call request.*

***Real solution:** Returning customer calls immediately upon a call request.*

6. Do it again to gather even more ideas, or evaluate what you've got with  **Rose, Thorn, Bud**.



Premortem

Think about all the ways something might go wrong, so you can effectively plan to stop it from happening.

We are very good at repeating mistakes. By running this tactic at the beginning of a project, you can highlight things that might slow you down or stop you later on. What's the worst that could happen? Now's the time to figure that out.

You'll need to  **Theme Sort** with this tactic. Afterwards, consider using  **Who, What, When** to put a clear plan of action together.

Premortem

1. To begin, brief the room on the current plan for the project you are about to embark on. If there isn't a plan, consider using  **Sticky Steps** beforehand.
 2. Inform the room that you have leapt forward in time and you've found the project has failed spectacularly.
 3. On sticky notes, ask the participants to independently write every reason they can think of for the failure.
 4. One by one, ask each participant to stick their prospective "failures" up on the wall and briefly talk about each one.
 5. Group similar or duplicate reasons with  **Theme Sort**. It's best to do this as you go.
 6. Map the themes on an  **Assumption Map**.
 7. Create a plan to:
 - a) mitigate your riskiest and most certain reasons.
 - b) investigate your riskiest and uncertain reasons.
- Tip: frame your reasons into  **How Might We...** questions to get everyone into problem solving mode.*
8. Assign responsibility to carry out actions after the session with  **Who, What, When**.



SWOT Analysis

Identify strengths, weaknesses, opportunities and threats for a desired end-state.

Evaluate your organisation or team's current likelihood of success relative to an objective. Understand what's impeding you, and what you can improve on.

This tactic works well with the goals from  **Newspaper Headline** or  **Objective and Key Results**. As well as evaluating project or a team, it's great for evaluating anything, such as ideas or business strategies.

SWOT Analysis

1. Before you start, ensure you have a desired end-state such as your  **Objective and Key Results** or your team's future vision from  **Newspaper Headline**.
2. Put a visualisation of the desired end-state on a wall so everyone can see it.
3. Create a quadrant as follows on a large surface:
4. On sticky notes, get the group to spend 5-10 minutes writing down all the *Strengths* in respect to the desired end-state.
5. Collect the sticky notes for *Strengths* and  **Theme Sort** them whilst the group begin working on the next section: *Weaknesses*.
6. Continue this way until all sections have been completed. Then give titles to each group of sticky notes and  **Blind Vote** to find the most important themes.
7. Discuss how the most important themes affect the desired end-state. Write  **How Might We...** questions for the implications that come up.

1 <i>Strengths</i>	2 <i>Opportunities</i>
3 <i>Weaknesses</i>	4 <i>Threats</i>



Rose, Thorn, Bud

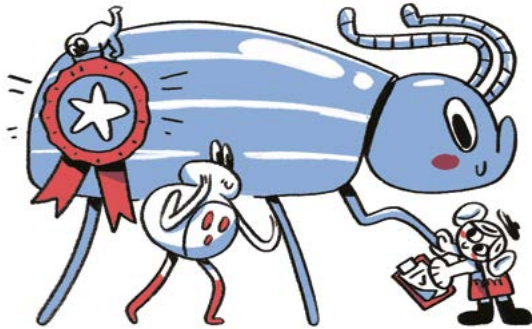
Evaluate an idea, project or process, identifying positives, negatives and opportunities.

Evaluate something as a group in order to find out what you really love about it, what might not be working and how to improve it.

You'll need to  **Theme Sort** to help you with this tactic. Afterwards, consider using  **Impact Effort Map** to prioritise the potential opportunities.

Rose, Thorn, Bud

1. Select and agree on the thing you want to evaluate.
For example: *a design, a project, an idea, a service, your life choices, the movie you just saw.*
2. Write a short description or find a suitable image of the thing.
3. Put it on the wall so everyone can see it clearly.
4. Explain the sticky note colour system:
 -  **Rose:** red sticky notes
(*positive aspects of the thing*)
 -  **Thorn:** yellow sticky notes
(*negative aspects, or things to watch out for*)
 -  **Bud:** green sticky notes
(*potential opportunities to grow the idea*)
5. Using this system, ask your group to write as many points as they can within a time limit.
6.  **Theme Sort** the sticky notes and take it in turns to discuss each person's point.



Idea Beetle

Evaluate if your idea is strong and has “legs”, or if it needs more thinking.

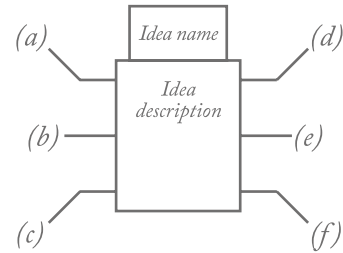
You might think you have a really good idea, but by evaluating it against a set of questions, you can quickly test its robustness. Fun fact: One in every four animals on the planet is a beetle. Similarly, one in every four business meetings is a total waste of time*.

**We made the second statistic up, but the truth is probably worse.*

If you don't have any ideas to evaluate, run  **Crazy Eights** first. It can be helpful to prioritise your ideas with  **Priority Map** beforehand, so you can evaluate ideas with the most potential.

Idea Beetle

1. Draw the Idea Beetle on a large surface.



2. In the head, write the name of the idea. In the body, describe the idea.

3. For each leg, write the answer to either or both set of questions:

- a) *Who is it for, and how does it help them?*
 - b) *What makes it different to what already exists?*
 - c) *What happens to the idea if you reverse it?*
 - d) *How could you grow this idea?*
 - e) *Why would people use this again and again?*
 - f) *How would explain it clearly in one sentence?*
-
- a) *Is the concept of the idea simple?*
 - b) *Is the idea unexpected?*
 - c) *Is the idea concrete? Can you visualise it in your head?*
 - d) *Is the idea credible, and is there enough detail?*
 - e) *Is the idea emotional? What does it make people feel?*
 - f) *Is there a story? How do you tell others about the idea?*



Heart, Head, Hand

Evaluate the usefulness, emotional resonance and business value of an idea.

When you're taking an idea further, this method of evaluation makes you consider all aspects of it, so it doesn't fall down when interrogated.

Beforehand, put your ideas (from a tactic like  **Crazy Eights**) into the  **T-Bar Format** to make them easier to evaluate. Consider using  **Round Robin** afterwards to help you develop your ideas further.

Heart, Head, Hand

1. Put your idea into the  **T-Bar Format** and stick it up on a wall so everyone can see it.
2. Facilitate a discussion by asking the following questions:

Heart (emotional)

- *Who will love this idea?*
- *Will users be delighted by it?*
- *Are you excited about it?*
- *Why would someone care?*

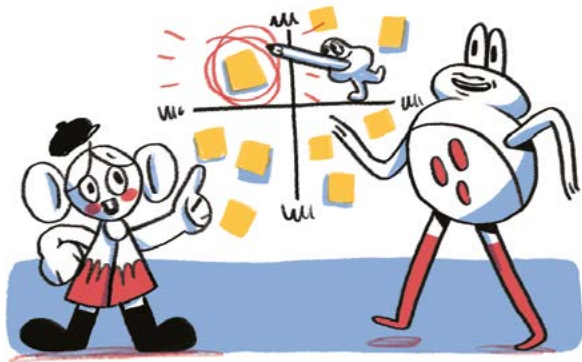
Head (logical)

- *Is it going to make sense to everyone?*
- *Does it offer anything useful or pleasurable to users?*
- *Does it support business objectives?*
- *Is it distinctive from the competition?*

Hands (practical)

- *Is it deliverable within a set budget and time frame?*
- *Does it rely on something else that has uncertainties?*
- *Will it get past any regulations or compliance requirements?*

3. Decide as a group if you should develop your idea further with  **Round Robin** or  **Storyboard**, or kill it with fire and do something else.



Priority Map

Find out where to focus based on criteria important to the group.

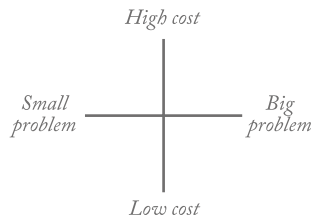
Find the magic combination between seemingly competing demands. This tactic encourages a debate about what is more important in any given context. Ruthless prioritisation is the secret super-power behind effective teams.



Prior to this tactic, have a list of items such as ideas from  **Crazy** **Eights** or problems from  **Sailboat** or  **SWOT Analysis**.

Priority Map

1. Draw two axes on a large surface.
2. Pick two criteria your participants find important.
Here are some commonly used examples:

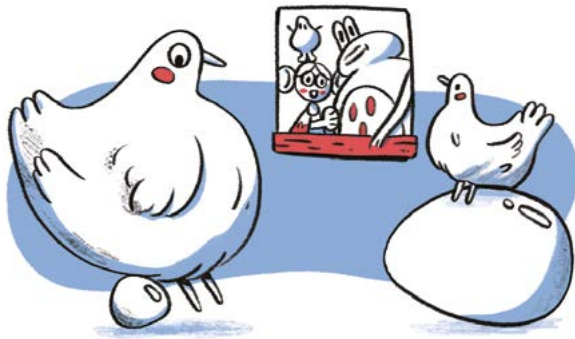


- Impact vs. Effort
- Risk vs. Knowledge
- Urgency vs. Importance
- Business Needs vs. User Needs
- Feasibility vs. User Value
- Cost vs. Problem

3. Plot your items (usually sticky notes) on the map by ranking them against the criteria. It can help to ask “is this more or less than this one?” to get a sense of relativity between items.

Tip: the value of this exercise is not in the absolute rankings you obtain, but in the discussion your participants will have around it. Make sure you not only capture the ranking, but also the arguments used in the discussion as well.





Impact Effort Map

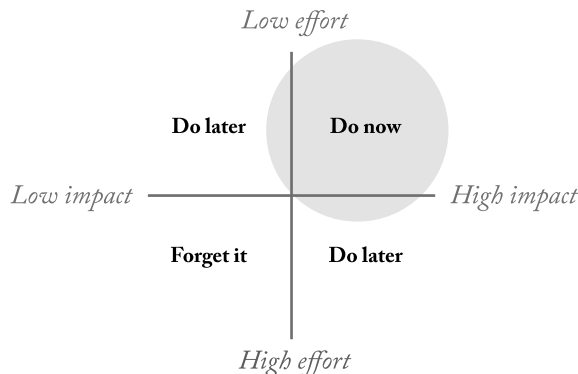
Group together ideas by how much effort they require to create, and by how much impact they'll have on your goal.

Narrowing down your ideas means that you can focus on what is going to be the easiest and most valuable thing to work on.

Prior to this tactic, gather a list of items such as ideas from  **Crazy Eights**, or problems from  **Sailboat**,  **Journey Map**,  **Service Map** or  **Empathy Map**.

Impact Effort Map

1. Gather your ideas together and write a name for each one on a sticky note.
2. Draw a  **Priority Map** with Impact and Effort on the axes. Make sure it's big enough to fit all your ideas!



3. Plot each idea on the graph. Discuss each one in turn. As a group, decide how much effort is involved and what the impact will be.
4. Make a plan with  **Sticky Steps** on how you'll action the ideas in "Do now". Create commitment to those actions with  **Who, What, When**.



Assumption Map

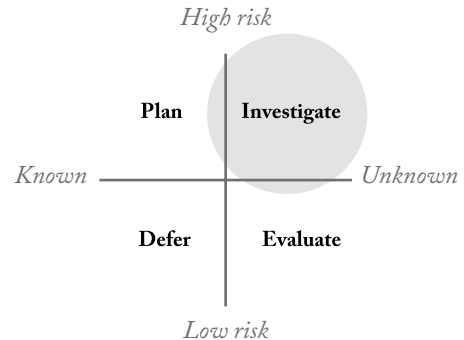
Prioritise your assumptions based on certainty and risk.

Identifying your riskiest and most unknown assumptions gives you clear picture on where to focus your energy. It's safe to assume that this is one of the most valuable tactics to have in your back pocket.

Make sure you have assumptions to prioritise by running  **Assumption Collecting** beforehand. Afterwards, use  **Hypothesis Statement** to turn your assumptions into a testable format.

Assumption Map

1. Plot your assumptions on a  **Priority Map** with Certainty and Risk on the axes:



2. Plot each assumption on the map, asking the group:

- *How bad would it be if we were wrong about this?*
- *How much understanding do we currently have?*

Tip: it can help to ask "is this more or less risky or unknown than this one?" to get a sense of relativity between items.

3. Continue this way until you have plotted all of your assumptions on the map.
4. Turn your riskiest and most unknown assumptions into a  **Hypothesis Statement** in order to start the process of validating them.



Blind Vote

Democratically make decisions as a group. Eliminate all but one thing, or find the top three things.

Help the team make decisions together, without being led by any one individual (*the “bandwagon effect”*). Blind voting neutralises any dominating personalities or opinions in the decision-making process.

Blind Vote

1. With a marker, clearly number each of the things you want the group to decide on. 1, 2, 3, 4, etc.
2. Ensure the group understands what they are going to vote on by allowing time for each person to explain the items up for vote.
3. Explain that each person has three votes each, to use in any way they like. You're allowed to vote on your own items, or put all three votes on one thing!
4. Ask each person in the group to secretly write down the number of the items they are voting for on a sticky note.
5. Once voting is finished, retrieve the votes from the participants. Count the votes and write the quantities on the items so everyone can clearly see the result of the voting.
6. If your items are ideas, consider developing them further with 🖐️ **T-Bar Format** or 📌 **Storyboard**.





\$100

Prioritise what ideas or features to focus on by deciding where to invest \$100.

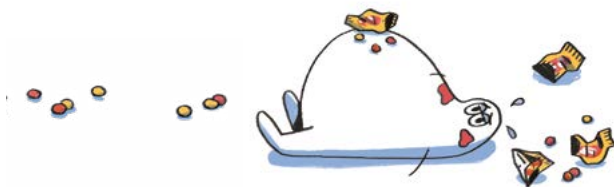
Using hard-earned cash as a voting tool is a fun yet clever way of getting participants in a pragmatic mindset. It changes the thought process from, “I like this one the most” to “where am I most likely to see a return on my investment?”

Prior to this tactic, gather a list of items such as ideas from  **Crazy Eights**, or problems from  **Sailboat**,  **Journey Map**,  **Service Map** or  **Empathy Map**.

\$100

1. Group together a list of items you want to prioritise.
2. Explain that each participant has \$100 to spend in any way they like. Ask the group: *Where are you most likely to see a return on your money? Where will you hedge your bets?*
3. Instruct everyone to vote: write down a monetary amount on a sticky note and place it against an item. Do this until they've 'spent' their budget.
4. When everyone has finished, count up the total amount spent on each item, and conclude where the most money has been spent.
5. Discuss the next steps on actioning this item with  **Who, What, When.**

Tip: add some theatre by using play money, or dish out some chocolates (assign a value of \$10 each) – just make sure the group is well-fed so they don't eat them all before you get started!





Who, What, When

Leave a session with a clear plan of goals and deadlines.

Leave the room knowing who's committing to what, and by when. Encouraging the group to define their own actions and deadlines creates accountability, which means its more likely to get done!

Who, What, When

1. Draw three columns on a large surface, preferably a whiteboard. From left to right, write “*Who*”, “*What*” and “*When*” at the top of each column.

<i>Who</i>	<i>What</i>	<i>When</i>

2. Starting with the “*Who*” column, write down the participants who will be taking an action.
3. Ask each participant what actual steps they can commit to. Write these in the “*What*” column.

Fun fact: people are more likely to commit to actions when they are declared in front of a group.

4. For each row, ask that person for a time and date they will have that item done by, and write it in its respective row. “Next week” is too vague, and doesn’t create concrete commitment.
5. At this point, there might be a lot to do. Encourage those who have not contributed so far to either come up with an action, or assist another person.



Start, Stop, Continue

Get balanced, actionable feedback from a group on a topic, project or team.

A productive way to encourage a group to optimise and improve a situation with clear actions, used midway through or at the end of a project. It can also be used for giving personal feedback.

Start, Stop, Continue

1. On a large surface, create three columns with “Start”, “Stop” and “Continue”.

Start

“What should we start doing?”

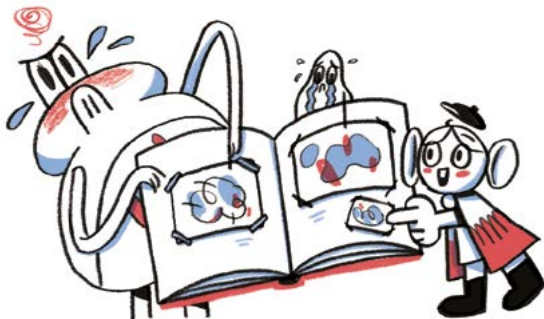
Stop

“What should we stop doing?”

Continue

“What should we continue doing?”

2. On sticky notes, ask each person to spend five minutes writing answers to: “*what should we start doing?*”.
3. In turn, have each person post their sticky notes in the “Start” column, and briefly talk through each one. 🖐️ **Theme Sort** as you go.
4. Do the same for the next two columns.
5. Save some time at the end of the meeting for discussions. This is a chance to reflect on all the input.
6. Prioritise the top three things to action with 🖐️ **Blind Vote**. Consider using 🖐️ **Who, What, When** to ensure there is commitment to the actions.



Mad, Sad, Glad

Get a sense of a team's feelings towards a current or previous project.

Understanding your team's emotions at any given time will help you be more effective as a group. Creating a safe space to air emotions is an important aspect of building trust in a team.

Mad, Sad, Glad

1. On a large surface, create three columns with “Mad”, “Sad” and “Glad”.

Mad

“What are you mad about?”

Sad

“What are you sad about?”

Glad

“What are you glad about?”

2. On sticky notes, ask each person to spend five minutes writing answers to: *“what are you mad about?”*
3. In turn, have each person post their sticky notes in the “Mad” column, and briefly talk through each one. 🖐️ **Theme Sort** as you go.
4. Do the same for the last two columns.
5. Save time at the end of the meeting for discussion. This is a chance to reflect on all the input.
6. Prioritise the top three things to action with 🖐️ **Blind Vote**. Consider using 🖐️ **Who, What, When** to ensure there is commitment to the actions.



Three Little Pigs

Reflect on what's going well, and what could be improved with the help of a childhood fable.

It's all too easy for a reflective meeting to descend into unhelpful huffing and puffing. Framing a discussion with the lens of stability, inspired by this classic folktale, helps highlight what problems need to be solved, whilst celebrating what's going well.

Three Little Pigs

1. On a large surface, create three columns:

Made of straw

Weak or could fall apart. High risk.

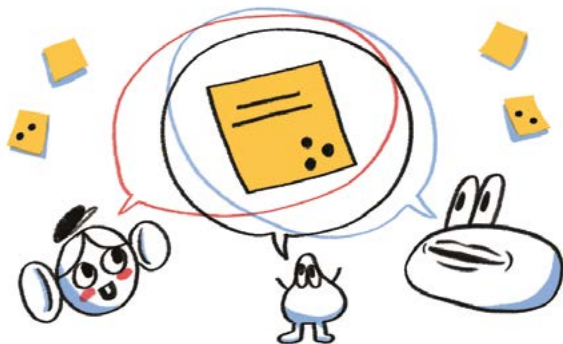
Made of sticks

Somewhat rigid. Medium risk

Made of stone

Immovable. Low risk

2. Explain to the group the story of the Three Little Pigs, if they aren't familiar with it.
3. On sticky notes, ask each person to spend two minutes writing answers to the first column. What aspects of your project, team, or anything work related are "made of straw" (weak, or could fall apart easily)?
4. In turn, have each person post their sticky notes in the "straw" column, and briefly talk through each one. 🖐️ **Theme Sort** as you go.
5. Do the same for the next two columns.
6. Save time at the end of the meeting for discussion. This is a chance to reflect on all the input.
7. Prioritise the top three things to action with 🖐️ **Blind Vote**. Consider using 🖐️ **Who, What, When** to ensure there is commitment to the actions.



Democratic Discussion

Build a discussion agenda together and keep track of what's been discussed, and what needs to be discussed.

By giving everyone a say in what will be discussed helps to include a wider range of topics, so everyone will be invested in the meeting. The discussions are prioritised so you can make sure you talk about the most important things first.

For a big group, combine this tactic with  **Fishbowl**.

Democratic Discussion

1. On a large surface, create a board with three columns:

To Discuss



Discussing



Discussed



- Ask everyone to write what they want to talk about on sticky notes, and stick it in the “*To Discuss*” column.
- Ask each person to sum up their topic. This is so people know what they are voting for in the next step.
- Use  **Blind Vote** to decide which topics to discuss.
- Arrange the “*To Discuss*” sticky notes in descending order of votes they received.
- Set a 10 minute timer, and start the discussion of the highest voted topic.
- When you reach the limit, as a group — decide whether to move on to the next topic or to continue the discussion for another 10 minutes.
- Note any actions from the discussion with  **Who, What, When.**



Fishbowl

A self-facilitating, inclusive discussion with a large group of people.

Fishbowl prevents the loudest voice in the room from dominating a discussion. It allows the entire group to participate and lessens distinctions between the speakers and the audience.

Fishbowl

1. Arrange three chairs in the middle of a room.
2. Invite the group to fill the 'audience' seats, and have two people sit on two of the seats in the middle, leaving one empty. These two people will begin the discussion.
3. Agree on the topic of discussion. Consider using the second step of  **Democratic Discussion** to find out what people want to discuss.
4. Explain that anyone, at any point in time, can come and sit in the unoccupied chair in the middle and join the discussion.



Then explain that when this happens, someone who is already participating in the discussion must voluntarily leave the “fishbowl” and free up a chair.



5. Set a time limit for the topic and instruct the participants to begin the discussion.



Theme Sort

Make sense of large amounts of information by clustering similar things together to find the theme.

When you have a lot of sticky notes, grouping them by similarity allows themes to emerge. This helps you make sense of a large amount of information, which means it's more easily prioritised.

Theme Sort

1. Make sure you've got a lot of wall space.
2. Whatever kind of information you have on your sticky notes, make sure there is one point per note.
3. Put the sticky notes on the wall, reading each one aloud as you do.
4. Each time you put up a new sticky note, ask yourself if it's related to or similar to a previous one. Place it near the existing note. If it's exactly the same, place it behind.
5. When all the sticky notes have been clustered, write a title for each on a larger sticky note. These are your themes.
6. Review the outliers; they may belong in smaller clusters.
7. Consider using  **Priority Map** or  **Blind Vote** to determine which theme is most important to the group.

Tip: it's easier to Theme Sort as you go. If you try to do it afterwards, it becomes more difficult to organise them.



T-Bar Format

Put your ideas into a format that can explain itself.

Having clearly articulated ideas in a consistent format makes them easier to understand and compare in a group. It also encourages the development of an idea by expanding on the detail and function.

T-Bar Format

1. For each idea, draw a “T” covering the height and width of a piece of paper.

<i>Title</i>	
<i>Sketch</i>	<i>A brief description</i>

2. On the right, give your idea a description that is easy to read. Bullet points are your friend.
3. Draw your idea on the left. It doesn't have to be a work of art. It just needs to help communicate your idea.
4. At the top, give your idea an inspiring title.
5. When everyone's completed their T-Bars, get them to stick them up on the wall and present them.
6. Prioritise the top three ideas with  **Blind Vote**, or write the titles for each T-Bar on sticky notes for use on a  **Priority Map**.



Session Principles

Creating principles for a meeting or workshop is a 5-10 minute investment resulting in an engaged and more effective group of people.

Bad habits have a tendency to create mundane, ineffective meetings that do not achieve their goals. Establishing and sticking to principles helps break those habits. Flexible principles create a container for an effective and productive meeting.

Session Principles

1. Write “Principles” on a whiteboard or a flip-chart.
2. Ask the group for suggestions they can agree on that will make the session more effective.
3. Discuss each principle in brief to ensure there is a shared understanding and there are no differing interpretations or opinions.
4. Explain that throughout the session, it’s okay to pause to ask questions, add to or amend the principles.

Tip: it’s important to make the group self-manage the principles. If the facilitator is the only enforcer of the rules, then the rules lose their power.

5. At the end, revisit the principles by asking:
 - “Are our principles still serving us?”
 - “Would we like to amend or adapt them in any way?”

Example principles:

- *No phones or laptops please!*
- *Listen more than you talk*
- *No questions are stupid*
- *Politely interrupt tangential conversation*
- *Share your snacks*
- *Never question the wisdom of Workshop Tactics*



Meeting Wizard

Set a clear purpose and structure to your meeting.

This tactic helps everyone understand the boundaries of the meeting to prevent any wasted time or unproductive tangents. It also gives the group a common ground to start from, as it's been agreed by everyone.

Meeting Wizard

1. At the start of the meeting, prepare the following points on a large surface:

Intention: what is the intention, or purpose, of the meeting? In other words, why have it?

Desired outcome(s): what specific outcomes should be achieved by the end of the meeting?

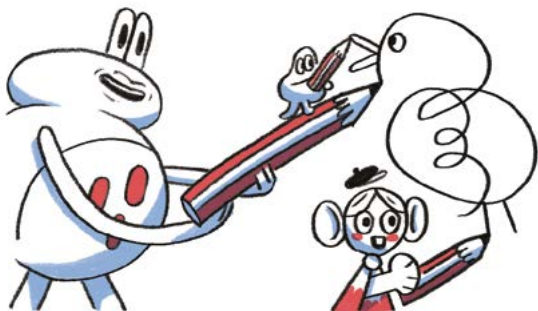
Agenda: what activities will the group go through, in what order, to move towards the desired outcome?

Roles: what roles or responsibilities need to be in place for the meeting to run smoothly? Who is facilitating, and who is participating? Who is documenting, and who is keeping track of the time? What do you expect of the participants?

Rules: what guidelines will be in place during the meeting? Use 👉 *Session Principles* to help you.

Time: including breaks, how much time is needed to achieve the desired outcomes? What time will the meeting end?

2. Invite everyone to ask questions or make suggestions for changes. Once the group is happy with the plan, begin the meeting.



Ice Breakers

Warm up the room so people feel more comfortable contributing to the session you are about to run.

Ice breakers can feel a bit awkward, but running a session with an unfamiliar group who don't feel comfortable sharing ideas is far worse. By encouraging people to build rapport with each other, and setting the tone for an activity-led meeting, you can have a more productive session.

Ice Breakers

a) Interesting questions

Ask the group to introduce themselves with their name and then something interesting about themselves, for example:

Given the choice of anyone in the world, whom would you want as a dinner guest?

If you could wake up tomorrow having gained any one quality or ability, what would it be?

b) Get comfortable drawing

People will claim they can't draw when sketching out ideas. Show them they can with **Squiggle Birds**:

1. Ask them to draw random squiggles on the paper.
2. Draw a small triangle on each of the squiggles.
3. Draw two lines for feet. They've drawn some birds!

c) Introduce each other

Ask the group to speak to the person on their left. Inform them that in a few minutes you will introduce each other.

Tip: don't spend too long using Ice Breakers. The meeting should warm up on its own naturally, but just one small exercise at the start can make all the difference.

Technique



Parking Lot

Keep workshops on track by 'parking' irrelevant questions or topics.

This technique helps ensure that important questions do not get lost and that the group can stay focused on the most relevant things. It's also a great way of shutting down unhelpful or tangential conversation.



Parking Lot

1. At the start of a meeting or workshop explain to the group that we are going to use a 'parking lot' to help us work more effectively.
2. Write a large 'P' at the top of some flip-chart paper and tape it to a prominent wall. Explain that whenever a point is raised or questions are asked that don't directly relate to the subject or session, you will write it on a sticky note, and stick that onto the flip-chart paper.
3. Use it throughout the meeting or workshop. Invite participants to add to the parking lot at any time.
4. As the meeting comes to a close, ensure that there is time to address the points and questions in the parking lot, with the whole group.

Tip: if there are any questions left unanswered, make sure that you or a group member follows them up.





Workshop Checklist

Remind yourself what you need to do before, during and after a workshop.

In our busy lives, it's easy to forget the basics. This checklist is a simple yet powerful reminder of the things you need to ensure a successful session.

"By failing to prepare, you are preparing to fail."
— Benjamin Franklin

Workshop Checklist

Before

- ☐ **Prepare** (booked room, invited people, set agenda)
- ☐ **Materials** (whiteboard, sticky notes and pens)
- ☐ **Tech check** (charger, adapter, screen, projector)
- ☐ **Room** (refreshments, temperature, chairs, wall space)

During

- ☐ **Preamble** (introductions and goal of the session)
- ☐ **Instruction** (explain how we are going to do that)
- ☐ **Be yourself** (your personality is your facilitation style)
- ☐ **Be flexible** (stop or change course if it's not working)

After

- ☐ **Gratitude** (thank everyone for their contribution)
- ☐ **Photograph** (record things that need documenting)
- ☐ **Clean and pack up** (leave the room how you found it)



*“Very little is needed to make a
happy life; it is all within yourself,
in your way of thinking.”*

Marcus Aurelius