

Moderating and Facilitating Groups & Creative Meetings

Fundamentals

We know a lot about experience, insights, and narrative, because *we did the work.*

They told us about it, and showed us.

Experience

Our customers have certain experiences.

We formed thoughtful insights about them.

Emotional Insight

Our customers feel certain ways.

We should go make these specific things.

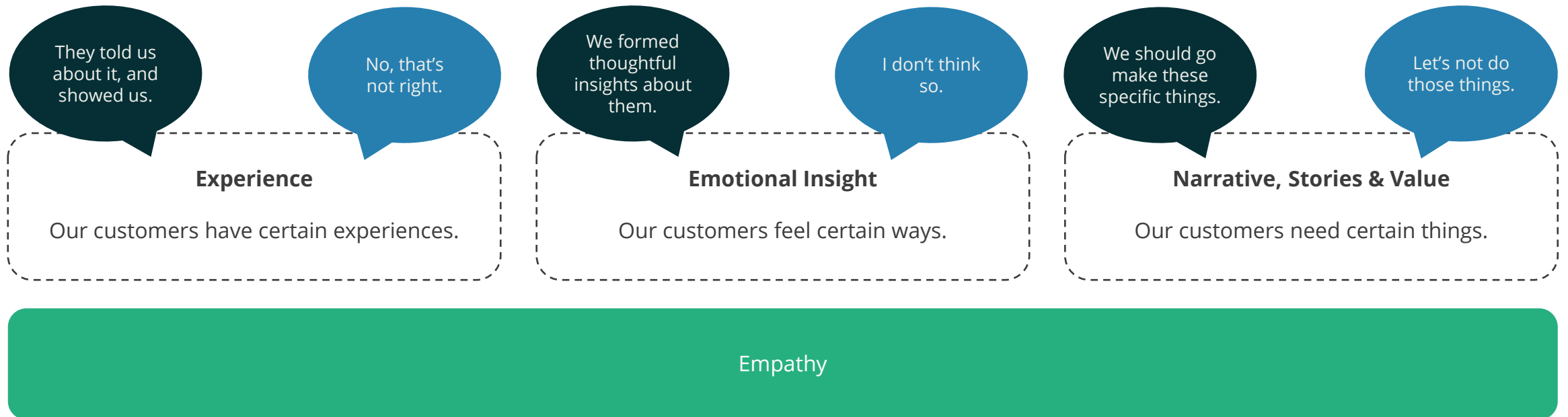
Narrative, Stories & Value

Our customers need certain things.

Empathy

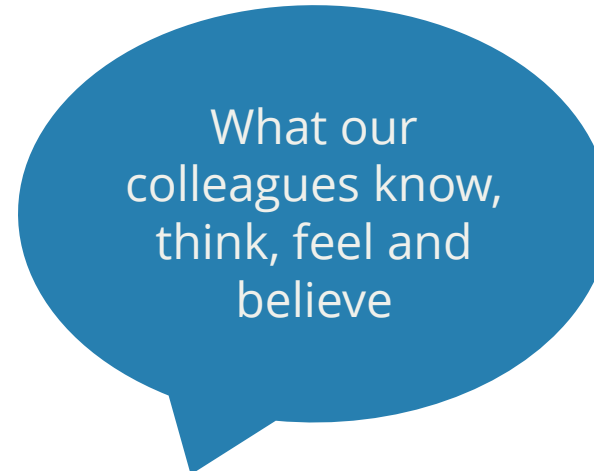
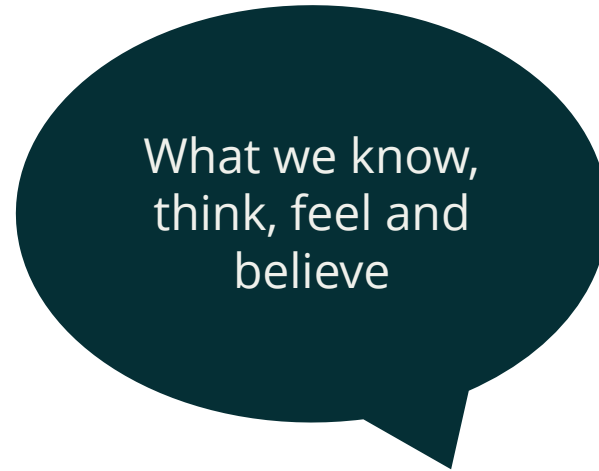
Fundamentals

Our stakeholders, clients and colleagues didn't do the work, and so they *know differently*.



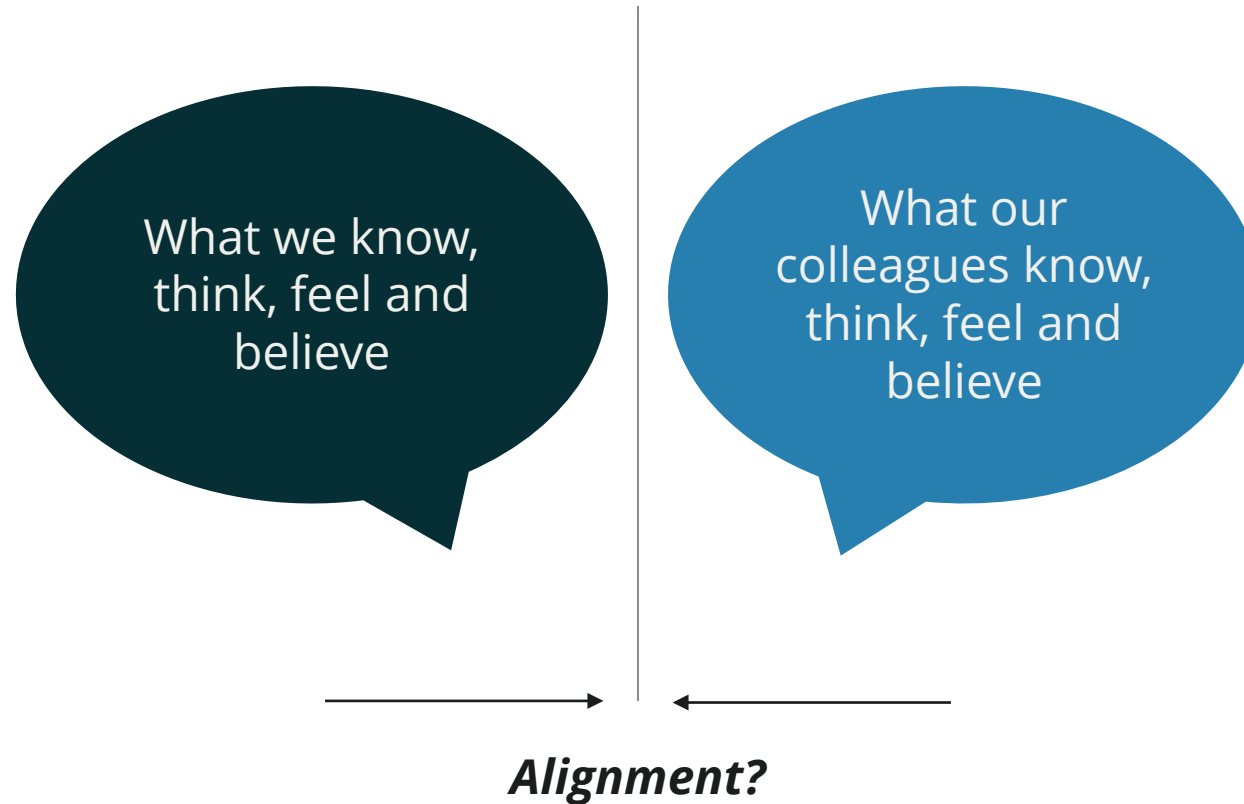
Fundamentals

A facilitated, creative session is intended to bridge this gap.



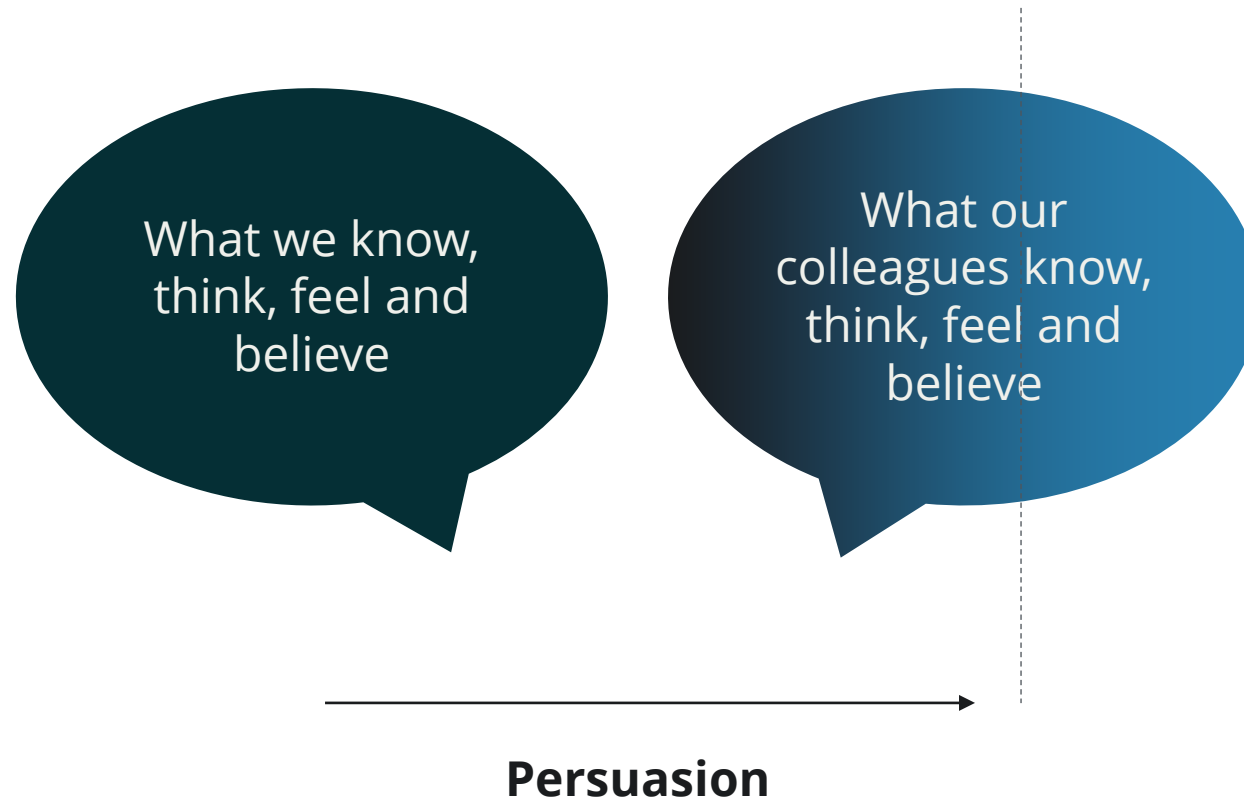
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Fundamentals

The basics

1. Identify what we know, feel, think, or believe
2. Identify what we want our colleagues to know, feel, think, or believe
3. Design activities and exercises to bridge the gap

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We will draw and make things, so participants feel ownership over ideas

We will collaborate, so participants feel included

We will democratize, so participants feel equal

Fundamentals

In detail...

Plan

What are our goals?

Who are the participants?

What do they know or think, and what do we want them to know or think?

Build

What are the best exercises or activities we can use to help shape and shift perspective and opinion?

What is the simplest way to run those activities?

Moderate

How can we build confidence?

How can we keep people on track?

How can we remain in control?

Document

What happened?

What are the implications of what happened?

How can we continually remind participants of what happened?

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Approach

Planning and building the activities

Plan

Build

Moderate

Document

We want...

We can...

To build trust and gain respect

Build something, **together**

To develop a strategy

Discuss, rank, and prioritize ideas,
together

To design lots of ideas

Create, within constraints, **together**

To define scope and boundaries

Write success criteria, **together**

To think across a journey

Map a customer experience, **together**

...

Approach

Planning and building the activities

Plan

Build

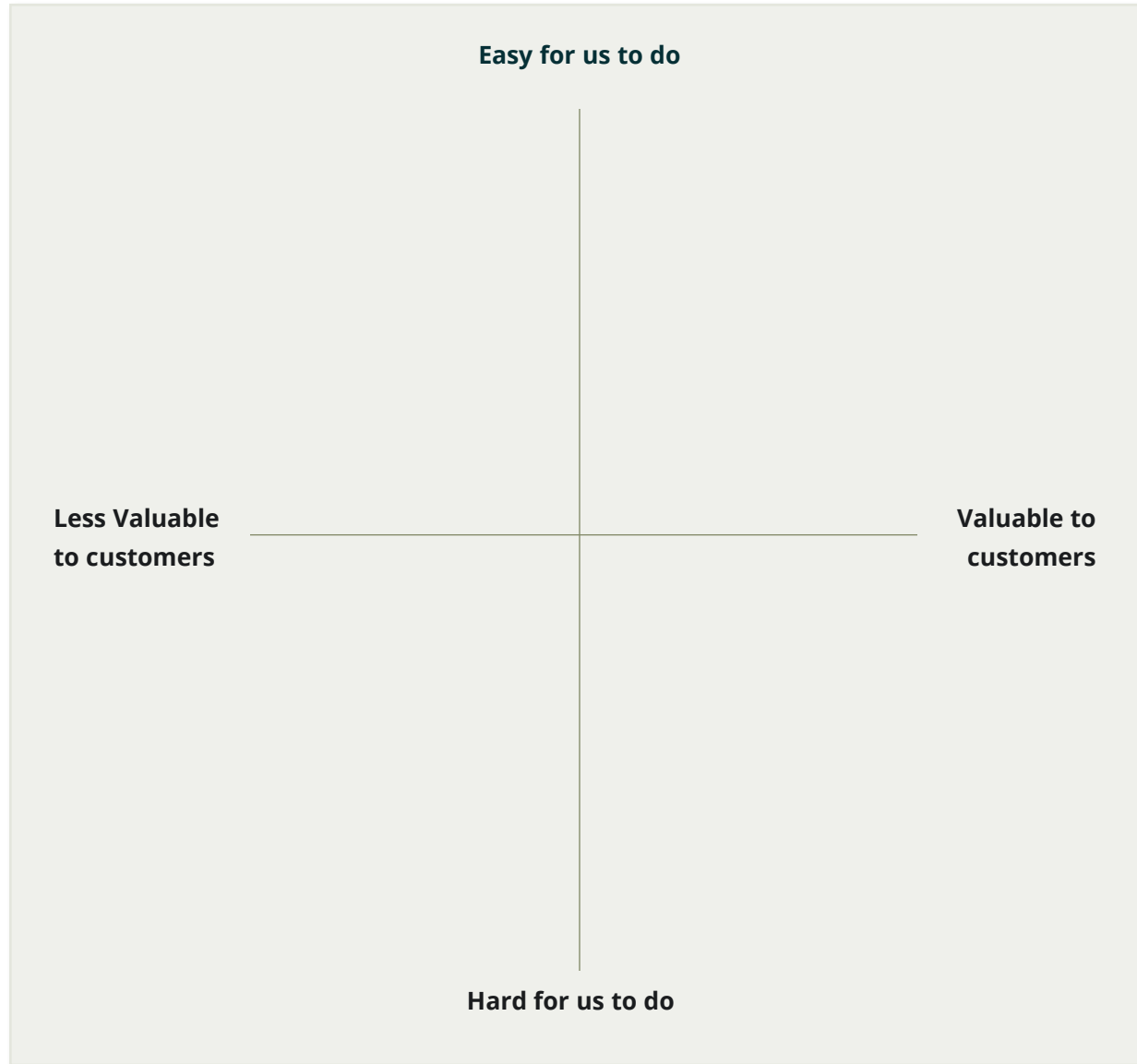
Moderate

Document

We are building the **framework**, not the content.

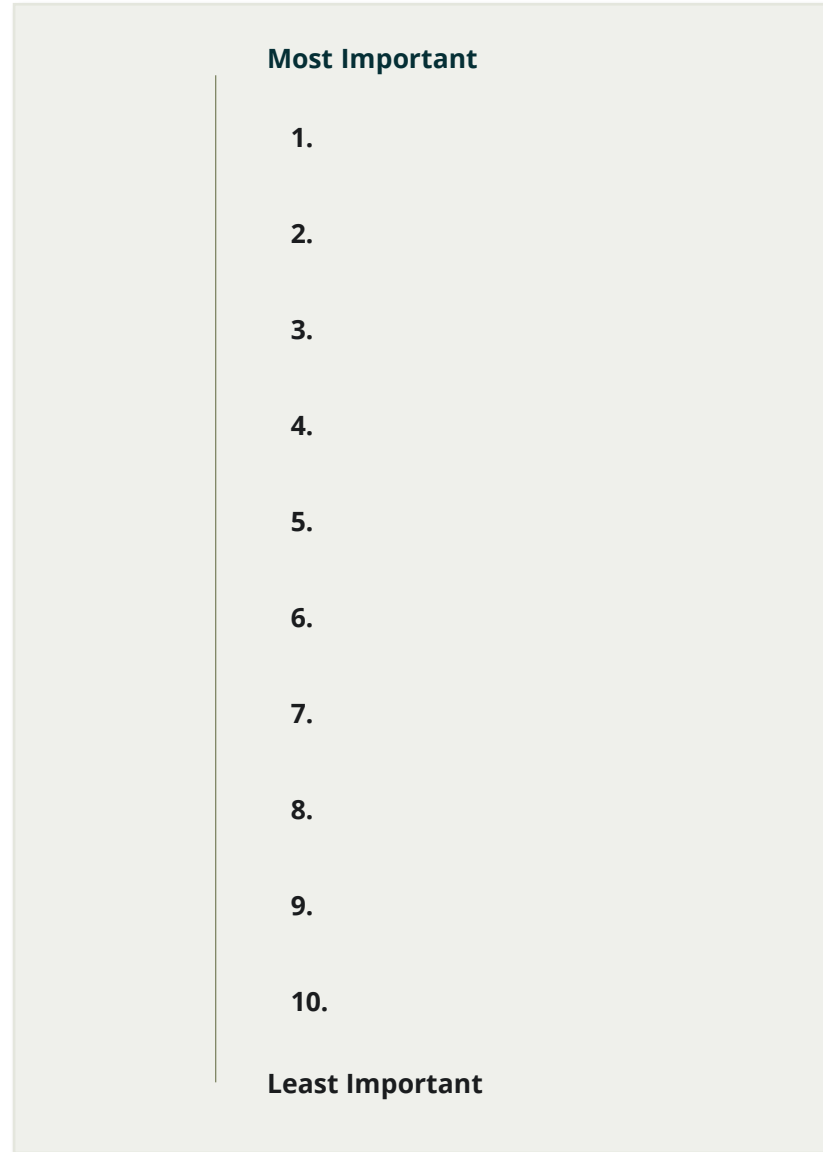
Frameworks

2x2



Frameworks

Forced Ranking



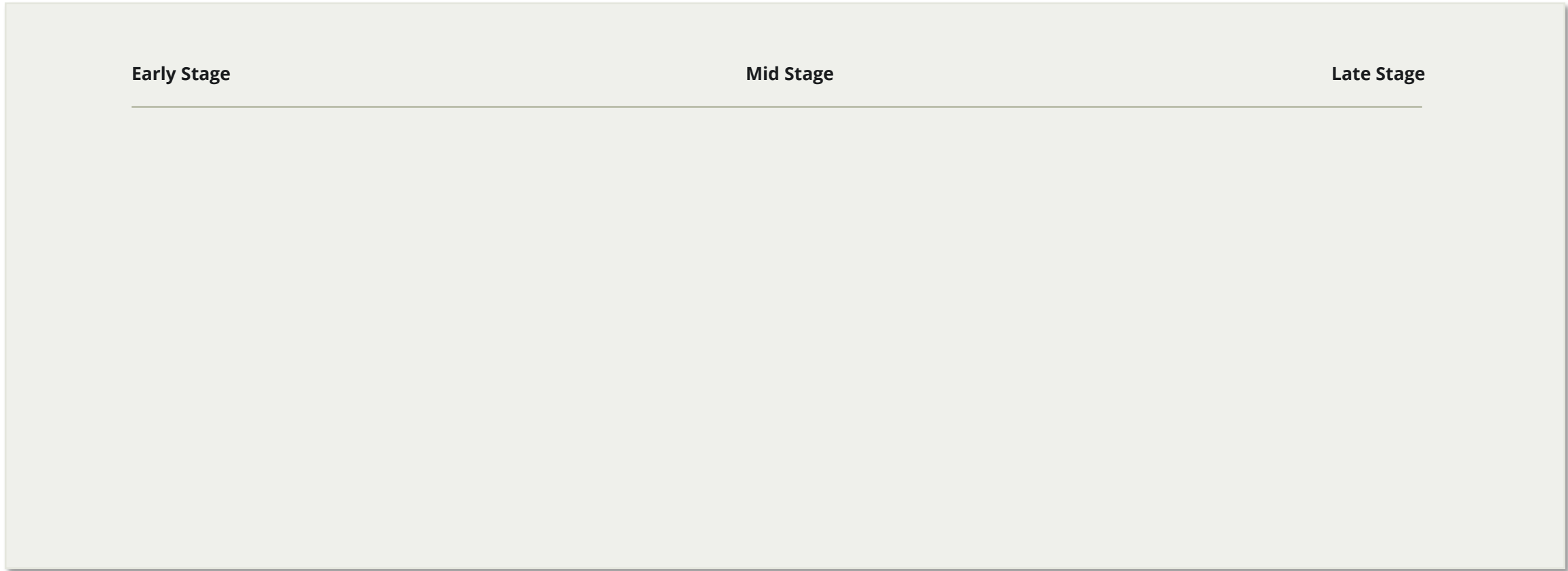
Frameworks

Timeline

Early Stage

Mid Stage

Late Stage



Frameworks

Success Criteria

To be successful, we must...

A challenge will be...

We'll know if it worked because...

Approach

Keeping the session on track

Plan

Build

Moderate

Document

Your role is to get people to participate
in the way you want, when you want.

Approach

Keeping the session on track

Plan

Build

Moderate

Document

- Describe the goal of the session
 - Describe the method – what will we build together?
 - Describe the rules:
 - Everyone participates
 - There are banned phrases:
We already did that
We can't do that
That will never work
That's too hard
- Begin the session
 - Include time for working privately
 - Include time for working together
 - Include time for synthesis and sensemaking
 - Summarize the session
 - What will happen next? When will the group see or hear from you again?
 - What should they expect?

Approach

Keeping the session on track

Plan

Build

Moderate

Document

When people...**We can...**

Don't talk

- Ask them a question, directly
- Go around the room, giving each person a chance to speak

Aren't paying attention

- Discuss their ideas, using their name
- Ask them, by name, if there's a better time to hold the workshop

Won't stop talking

- Interrupt them, nicely
- Acknowledge their comments as something to discuss later

Pull rank

- Remind them why we are here
- Allow them to do their thing

Don't do a good job

- Don't worry - you'll have time to fix it later

Approach

Making sure everyone remembers

Plan

Build

Moderate

Document

When the sessions over, make sure to document what happened, why it happened, and what will happen next.

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Thank you!

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