Step 1: Determine a Focus Question

The focus question drives the results. Every session will have its own focus question. Sample focus questions are:

* Who are our users?
* What features do users need?
* What goals do users have when they come to our site?
* What did we learn in our usability study?
* What are the biggest obstacles preventing our products from selling?

We can only work on one focus question at a time, so we pick the most important one first. (An experienced team can do two rounds of KJ’s in an hour allowing them to deal with two important questions.)

Step 2: Organize the Group

Get folks together for an hour. We want people from different parts of the organization, to get their different perspectives.

Step 3: Put Opinions (or Data) onto Sticky Notes

Putting one item on each sticky note, we ask each group participant brainstorm as many items as they can think of.

Step 4: Put Sticky Notes on the Wall

In random order, each participant puts their sticky notes up on the wall. Then, they read other people’s contributions. If, at any time, they think of something else that should go on the wall, they need to jot it down on a sticky note and add it to the collection.

Step 5: Group Similar Items

Once everyone has had a chance to add their contributions to the wall, the facilitator instructs the group to start grouping like items in another part of the room. This is what we say when we’re facilitating

“Take two items that seem like they belong together and place them in an empty portion of the wall, at least 2 feet away from any other sticky notes. Then keep moving other like items into that group.”

“Feel free to move items into groups other people create. If, when reviewing someone else’s group, it doesn’t quite make sense to you, please feel free to rearrange the items until the grouping makes sense.”

“You’re to complete this step without any discussion of the sticky notes or the groups. Every item has to be in a group, though there are likely to be a few groups with only one item.”

Notice that we’ve not allowed the group any discussion about the contents yet. We’ve found that premature discussion often focuses on*borderline* items — things might be unimportant to the focus question. If they aren’t important, then spending any time discussing them is a waste.

In later steps in the process, we have time to discuss the important items. Therefore, by preventing conversation now, we save time for the important conversations later.

This step is complete when all the items are moved from the original wall into groups.

Step 6: Naming Each Group

Using the second color of sticky notes, we ask each participant to assign a name to each group. Here are the instructions we give:

“I want you to now give each group a name. Read through each group and write down a name that best represents each group on the new set of sticky notes I just gave you.”

“A name is a noun cluster, such as ‘Printer Support Problems’. Please refrain from writing entire sentences.”

“As you read through each group, you may realize that the group really has two themes. Feel free to split those groups up, as appropriate.”

“You may also notice that two groups really share the same theme. In that case, you can feel free to combine the two groups into one.”

“Please give every group a name. A group can have more than one name. The only time you´re excused from giving a group a name is if someone has already used the *exact*words you had intended to use.”

Again, notice here that we’re not allowing the group to discuss the name. Everyone gets a chance to get their own views out, regardless of the politics and personalities involved.

This step has a hidden agenda: the final review. By insisting that everyone read every group, it forces the participants to review everything on the wall and consider it. This is critical for the next step: voting.

Step 7: Voting for the Most Important Groups

When we have finished this step, every participant will have democratically shared their opinion on the most important groups. This will be independent of any coercion amongst their peers or factors like the number of items in each group. They’ll purely use their own viewpoint to choose those groups are most important to answering the focus question.

To get through this stage quickly, we break it up into three parts. First, we have each participant grab a piece of scrap paper and write down the names of the three groups that they feel are most important.

We’ll repeat the focus question at this point, so they know which question they are answering. For example, if our focus is “What features do users need?”, we’ll give these instructions to the participants:

“On a piece of scrap paper that you will neither post nor share, I want you to write down the three names of groups that you think best answer this question: What are the *most important* features that users need?”

“If a group has more than one name, you are to chose the name that *best* represents the most important features in that group.”

Occasionally, participants will have trouble narrowing the groups to just three. We’ll often instruct the people having trouble to write down five, then cross two off. While this often produces a giggle, it turns out to be helpful to some participants.

The second part of this step happens when they have their three choices. We ask them to rank them from most important to least important. We’ve found that doing this separately from identifying the top three makes it easier on the participants.

After we’ve ensured that everyone has their three top choices and has ranked them, we give the last part of the instructions: to record their votes on the group sticky. If, for example, the group sticky notes are blue, we’d use these instructions:

“I want you to go to the blue sticky that best represents your first most important choice and put three X’s on it.”

“You can then go to your second most important choice and put two X’s on it.”

“Finally, go to your third most important choice and put a single X on it.”

When we’re done, everyone will mark six X’s on the group names that they feel are most important.

Again, notice that there we’ve not allowed any group discussion up until this point. Even though they’ve worked as a group, we’ve prevented discussion from eating up any portion of the meeting.

This is because, up until now, we’ve not known what items were most important. It just doesn’t make sense to spend time discussing unimportant items.

Step 8: Ranking the Most Important Groups

Once everyone has marked their votes, we grab all the group sticky notes with votes on them and place them on the whiteboard (or flipchart). We’ll order them by the number of votes each sticky received, with the highest numbers at the top.

At this point we ask the group to gather around the whiteboard and we read off, in order of importance, the names of each group that received votes.

Because some groups may actually represent identical priorities, we allow the team a few moments to consider combining groups. We have a simple process for doing this. Here’s how we explain it to the participants:

“We now need to see if there are any groups that we should combine. You can nominate two groups that you think are the same thing.”

“We’ll then take a preliminary vote, to see if anyone thinks they aren’t the same. If anyone believes they are different, we’ll spend a little time discussing why they believe that.”

“After the brief discussion, we’ll take a final vote. That vote needs to be unanimous for us to combine the items and their scores.”

“Remember, the two groups being considered need to be*identical*. That means you could substitute one for the other. A group that’s a subset of the other group does not qualify for combining.”

As each pair is nominated, we take the preliminary vote. We let the participants discuss amongst themselves why they are for or against combining. As facilitator, we let everyone have their say and pay close attention to the group dynamics, to prevent people from getting their opinions bullied.

Since we insist on unanimous agreement for combining items, it gives great power to a single person. However, since the items were already scored, it’s hard to abuse the power in any meaningful way. Someone who is trying to hold up the process by being argumentative won’t get very far.

Every time we combine two items, their scores are added together and they are moved higher in the list. Usually, we reach a point where there are three or four items which are ranked much higher than the rest. At this point, the facilitator can stop the process, since any further combinations are unlikely to change these top priorities in any meaningful way.

At this point, the facilitator declares the exercise finished and reviews the top three or four ranked items. These are the top priorities for the focus question.

**Reaching Consensus in Record Time**

When the Fabrikam UX methodology works (and it has rarely failed us), we reach group consensus much faster than any other method we’ve had. Because we’ve encouraged people from all over the organization to participate, the resulting priorities will typically stand the test of time and won’t come under constant challenge.

The Fabrikam UX methodology is a fascinating mix of independent brainstorming, group dynamics, and democracy. It allows a team to be creative and critical in a productive manner, where strong personalities and politics play second fiddle to the independent perspectives and experience of the team.

The Fabrikam UX methodology is such a valuable tool that we sometimes wonder how we’d ever get our job done without it.