

F FACILITATOR CARDS

FACILITATION

GUIDE



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# Introduction

60 cards. 60 different processing tools. Limitless possibilities. This text could be called the “Barely Scratching the Surface Guide to Facilitator Cards.” Here’s how we’re going to scratch the surface:

We hope the Facilitator Cards Facilitation Guide will help you become more familiar with the tools in the deck, gain a better understanding of what tools to use when, as well as learn more about the types of decisions and questions to ask as a facilitator that will lead you to the best decision in the moment<sup>1</sup>.

Each processing tool gets its own chapter. These chapters provide:

1. **A longer explanation of how to facilitate the process.** Building on the short description, we’ll explain things like the set-up, in-between steps, prompts, and context. The goal here is to leave you with zero questions about how you can use this process with your group.
2. **Our rationale behind how the card is categorized.** Why is it assigned that group configuration? That mode? Those props?
3. **Suggestions for adapting the tool to other categories.** What if you wanted to change the group configuration? Mode? Props? We’ll give you some starting points to do so.
4. **What this card is great for.** We’ll highlight some of the things that makes this particular processing tool shine, giving you ideas for how to put it to work.
5. **When to use another card.** We’ll point out some of the pitfalls of the processing tool, nudging you toward other cards if you have a particular outcome in mind, and that outcome isn’t something this card is well-suited to accomplish.

## Special Caveat for the Preview Pack:

There are references to other processing tools (e.g., in the “How to Use this Card + Another Card” sections) that are not included in the Preview Pack deck. Rest assured, all of the tools referenced will be included in the complete deck of Facilitator Cards. Spoilers!

6. **When to use this card instead of another.** Are you choosing between two cards in the same mode? Let us help. Beyond just the props and group configurations, there are some non-obvious “gotchas” that might push you off the fence.
7. **How to use this card + another card.** Facilitator Cards work best when paired with other cards. We’ll introduce some pairings to consider, and give you a quick explanation for how you might facilitate them.

As you progress through the chapters, you might notice that a suggestion is missing, or we have fewer pointers for one card than the other. This isn’t an oversight on our part, but either (1) an implicit statement that we don’t recommend using that card in that way (e.g., if there is no suggestion for how to use a processing tool “For Full Groups”, we might be saying “We don’t suggest you use this tool in that way.”); or (2) a reflection of our lack of creativity, or inability to come up with something compelling. How will you know which is which? You won’t! We don’t tell you, and here’s why: we want you to assume it’s #2 every time, and to write in and help supplement our creativity for everyone’s benefit. Even if it was #1, we’d love to be proven wrong, and invite you to be the one to point out what we overlooked.

<sup>1</sup> We’ve been using Facilitator Cards for several years now, and still learned a lot from writing these explainers. We hope you learn a lot by reading them! Please tell us how we can improve this guide for you: [hello@facilitator.cards](mailto:hello@facilitator.cards)

# Casting a Wide Net


We know that Facilitator Cards are useful to a broad range of facilitators<sup>2</sup>. These processing tools are all versatile, tried-and-true ways to engage a group, with infinite applications. We don't know who we don't know to include, so these write-ups reflect our ability to do our best to cast a net that's wide enough to include everyone — facilitators of all stripes.

The way this shows up is in our framing language in the longer explanations, in any example prompts we give, and in the general “do this” and “don't do that” suggestions. We'll often use ellipsis (“...”) or blanks (“\_\_\_”) to stop ourselves from making an example more narrow than it needs to be.

For example, we might say, “Prompt the group by saying ‘We're going to be talking about...’”, when instead we could have said, “Prompt the group by saying ‘We're going to be talking about the best ways to weave a basket underwater.’”

We want you to fill in the ellipsis with the context, goals, population, and passions that undergird your facilitations. So the write-ups are useful even if you *aren't* facilitating underwater basket weaving trainings. That's a pretty wide net.

## Most Facilitators, Most of the Time

One last thing before we get into the card-by-card explanations: our compass in writing these explainers, in addition to casting a wide net, is to make the advice useful to “most facilitators, most of the time.” By this, we mean *most* different types of facilitators will benefit from these cards and our write-ups of them, and the tips and tricks will be useful *most* of the time. “Most”  here defined as a mere 51%.

If we did our job well, you'll read *most* of this

and think, “Yep, I could do that.” or “That might work for me.” or “Oh, fun, hadn't thought of that.” Those were the bits we wrote for you!

You also will find yourself saying “Nope.” and “What? Why?” and “That makes exactly opposite sense for what I do.” quite a lot. Those were the bits we wrote for someone else.

Trust your gut. Use what you can use. Discard what can't. No pressure: that part wasn't for you.

<sup>2</sup> Including outdoor educators, orientation leaders, classroom teachers, corporate retreaters, social justice educators, creative directors, and more.



# MAGNET STATEMENTS



Full Group



Emotion



None

Set up the space for easy movement. Prime the group with a topic or concept, and ask for one participant to make a related statement they believe. Other participants respond by moving closer or farther based on their agreement or disagreement. Ask for another statement, then repeat.

## Longer Context

The ideal space is a wide-open area where participants can easily move past one another, be at varying distances, and reposition themselves without navigating around obstacles. If you need to move chairs, tables, or other furniture in the room, be sure to do this before giving instructions or you will likely have to repeat yourself.

Set up by introducing the topic. You want a topic that is broad enough to allow for a lot of differences of interpretation and opinion, but narrow enough that it will spark strong reactions in your participants.

After you've introduced the topic, give the instructions for the process: "We are going to be inviting you to make 'magnet' statements, one at a time, in response to this topic. After someone makes a statement that is true for them, we ask that you position yourself within the space as a response to how much you find yourself aligning with the statement. If you absolutely agree, move right next to them. The more you disagree, the further you should move away. We'll then ask someone who isn't in agreement to revise the statement such that it's true for them. We'll repeat this process several times, responding with our movement to different statements from new voices."

Be sure to specify the ways you'll be inviting people to make statements (e.g., "I'll pick people to respond," "Raise your hand if you want to make a statement"), and know that you can change up how you allow participants to respond throughout the process. In general, it's good to hear from people who are on their own in the room, because their response will often shake up the arrangement of the room.

Between each magnet statement, invite the participants to observe where they are and where the group is as a whole before the next person makes a statement.

Let the *Magnet Statements* run for as long as you like, until the group runs out of statements to make, or until you feel the energy waning.

## Why Full Group? Why Emotion?

This tool provides a means for everyone in the group to participate and express their thoughts and opinions without actually needing to verbally respond. The bigger the group the better, because you'll have a wider range of statements shared, showcasing the variety of perspectives in the group through movement. At times, there will be several islands of belief, which can suddenly transform into one unified continent. This allows the entire group to get a sense of where the rest of the group is quickly on a wide range of ideas.

## For Small Groups

For small groups, designate an area within your larger space for each group (e.g., divide the room into quadrants for four groups). Change the goals slightly: challenge participants within each small group to make statements in response to the prompt that results in everyone in their group standing near them. As long as there's disagreement (distance between participants), they need to keep revising the statement until everyone can agree (or they give up, or run out of time). Once every small group is in agreement (or they run out of time), have them share the statement with the full group, and invite the other groups' participants to respond with movement. Did you find a statement everyone in the room agrees with? You can repeat this several times, giving the groups short time limits (e.g., 3 minutes) for each prompt.

# For Ideation, Clarification, or Execution

To use *Magnet Statements* as an ideation tool, identify a topic for the group to start to make suggestions about. The first person starts by making a suggestion. Participants then spread out according to how far away their idea was from that first suggestion. If they had the exact same idea they should stand right next to the person, a slightly different idea they'd move a small distance away, and a completely different or opposing idea a large distance away. Have participants of varying distances share their ideas.

For clarification, instead of having participants make one statement after another provide time for participants to share their reasoning. Once participants move after a statement is made, provide an opportunity for a few participants to share why they moved where they did. After a few shares have been made. Invite another statement and repeat the process.

For execution, have participants make statements about what they want moving forward. Having participants respond to these statements by moving closer or further can operate as a barometer to get a sense of how much support a particular future step might receive.

## This Card is Great For...

**Quickly surfacing where the entire group stands in relation to a particular opinion (literally and metaphorically!).** Conversations can quickly introduce dozens of different opinions, and it's difficult to know how much everyone agrees or disagrees with anything being said. But magnet statements force the group to weigh in on everything being said, giving you a good snapshot of everyone's opinions.

**Getting to know a group and having the**

**group get to know each other.** Additionally, because the participants are the ones making the statements, you can gain insight into the group both from the statements they make and their responses.

**Non-verbal communication and mixing up the energy of the space.** If you've been talking a lot, or sitting still, Magnet Statements is a great way to change the pace of your facilitation. Non-verbal communication is a fun break from talking, and physically moving around can awaken a dormant participant.

**Challenging participants to make declarative statements.** Often conversations stall out because people won't state what they think or believe. This set up helps overcome that inertia by making bold declarations the only option for verbal participation.

## Don't Use This Card if...

**If you want to have control over what the group is responding to.** This tool works best when you give control of the statements made over to the group. If there are particular statements you want them to respond to, or you need to control the content in general, *Spectrum Statements* or *Fill in the Gap* are better fits.

**The space doesn't work.** If there simply isn't space to move, don't try to force it. Participants will not only be irritated by having to navigate furniture, but this annoyance can lead them to move less which will diminish the usefulness of the tool. Use *Finger Voting* (1 = completely disagree, 5 = completely agree) in response to participant-generated statements instead.



# Use This Card Instead of That Card when...

**Use Magnet Statements, not “Go Around” or Popcorn Share, when...** it’s more important for you to know where the entire group stands in relation to a few opinions than it is to hear individual opinions from everyone in the group.

**Use Magnet Statements, not Airport Sign, when...** you want to create an opportunity for movement and it’s helpful for your participants to respond to one another’s opinions.

**Use Magnet Statements, not Concentric Circles, when...** you want to make sure everyone is involved in one universal conversation, having the opportunity to react differently to the same opinions being shared.

Take note during *Magnet Statements* of contentious statements and statements that people have strong emotional reactions to. After *Magnet Statements* comes to a close, transition the group into *Matchstick Convos* to further discuss these particular statements to gain further insight and understanding.

**Magnet Statements + What’s the MVP =** Prompt the group to make statements that they believe should be included in the initial MVP. Anytime someone makes a statement where all participants agree (i.e., there is only one big glob of people), capture it on a sticky note and post it in on a surface designated for “MVP.” Statements with close to the entire group can also be captured on stickies as MVP candidates for further investigation.

# How to Use This Card + Another Card

**Magnet Statements + 5 Why’s =** While the group is moving through *Magnet Statements*, be on the lookout for a statement that seems to really activate the group. Perhaps people think longer about it, the group is more spread out, or people are more surprised to see other people’s reactions than with other statements. Use that statement to formulate an initial question for 5 *Why’s*.

**Magnet Statements + Poster Presentations =** While the group is making statements, consider which statements could be expanded upon for further clarity and understanding. After *Magnet Statements* break the group into small groups based on their opinions about particular statements. Have each group create a poster to present to the full group that explains their position.

**Magnet Statements + Matchstick Convos =**



# REVERSE ENGINEERING



Individual



Ideation



Paper  
Writing Utensils

Ask the participants to imagine that you're in a future where you accomplished your goals, or achieved perfection in regards to a particular concept. Viewing that finished product, what steps were taken to accomplish it? What pitfalls were avoided?



## Longer Context

Pass out paper and writing utensils to participants. After everyone has supplies, provide initial context for the activity. Give the instructions, asking participants to imagine they're in a future where whatever you're currently concerned with (i.e., the project, goal, concept, idea) is perfect. A utopian version of whatever you're focusing on. Pause for a moment so they can reflect on that idea.

This is one of those situations where the old adage "there is no 'correct' answer" answer applies. You want to encourage them to come up with as bold, creative, or unique of an idea for their future as they feel compelled to imagine. No limitations and this won't be graded. It's okay if everyone's answers are different. If you're going to be having them share their reflections, tell them that up front.

After they've had a moment to reflect, ask them to write down any thoughts they have on how that future was accomplished. For example, "What needed to happen in order to get to that perfect future? What were the steps taken to succeed? How were pitfalls avoided along the way? What were the big milestones? Forks in the road? Decisions?"

## Why Individual? Why Ideation?

Having participants work as individuals on this activity allows participants to generate different ideas for what the perfect future would look like and the steps to get there. This enables the group to get a sense of what everyone is currently viewing as the ideal outcome, with all the different outcomes and steps along the way.

You'll often find that many of the ideas people come up with are universally helpful, even when their ideal futures vary.

## For Pairs or Small Groups

For pairs or small groups, the tricky part is going to be ensuring everyone agrees on what their utopian future is. You can do this in one of two ways: establish a consensus on what that is beforehand (then have pairs or small groups split up to ideate on the steps), or build consensus-making into the process. After your groups have consensus, you can follow through on the process exactly as you do individually, having everyone contribute ideas and recording them.

## For Emotion or Clarification

For emotion, ask participants how they feel right now regarding the project or the topic at hand. Then ask them to write down what are all the things that are going on that contributed to their current state. "What needed to happen in order for you to feel the way you do right now?" Alternatively, if you want to have them envision a future emotional state, ask them how they would like to feel about the topic at hand, "What would an ideal future emotional state be?" Have them brainstorm about that future emotional state, determining what would have needed to happen in order for them to feel that way.

For clarification, have participants reverse engineer what it took to accomplish something that's already happened (i.e., a project, creation, organization, or current status quo). "What led to the thing that currently exists existing?" You can do this individually, in small groups, or as a full group.

# This Card is Great for...

**When open-ended brainstorming feels overwhelming.** There is a philosophy when teaching chess that has the learner start with just the final pieces left on the board (the “end game”), instead of learning from the starting position with all pieces in play (the “opening”). *Reverse Engineering* works similarly, removing all the pieces you don’t need, and working your way backward from a successful endgame.

**Quality over quantity.** The ideas generated by *Reverse Engineering* will tend to be fewer in numbers than other ideation processes, but more likely to be useful. Because you’re asking for people to consider their impact, and alignment within an overall process, the ideas that surface are more likely to be strong contenders.

**Getting clear on the destination.** Sometimes conversation gets stuck in the, “How are we going to do this?” and never gets to the, “What are we working towards?” and “Are we united in the vision?” This tool requires people to get clear about what outcomes would manifest in their perfect world, and what would need to happen to get there.

**Starting fresh.** Sometimes we get stuck in trying to solve problems because our thinking is too focused on what is already happening, or has happened. This can limit us to incremental thinking, or bind our options. *Reverse Engineering* is great because it allows our thinking to be shaped by what we want to be true rather than by what has happened in the past, or is currently true.

# Don’t Use This Card if...

**You want to focus on the low hanging fruit.** The ideas that are surfaced in this process are thoughtful, and tend to require a lot of mental work. If you just want the first things that come

to people’s minds, we recommend *Make a List* instead.

**Individuals aren’t likely to be able to imagine a clear future regarding your concept.** If they don’t have the agency to effect change, or necessary information to imagine the steps, creating a mental utopia will likely be frustrating, impossible, or unhelpful. Use *I Know vs. I Wonder* instead.

**You need everyone to be on the same page.** There are likely going to be many divergent paths that result from individualized *Reverse Engineering*. If you need full group consensus, or for everyone to be working from a shared understanding, use *Opposite Thinking* instead.

# Use This Card Instead of That Card when...

**Use Reverse Engineering, not Generate a List when...** you want to provide space for people to ideate on their own. When members of the group are dominating the conversation it’s hard for the quieter or more reflective participants to get their ideas out, or to have a chance to sit with their ideas, *Reverse Engineering* creates an opportunity for everyone to do deep thinking before discussing their ideas with the group.

**Use Reverse Engineering, not Drawing a Caricature when...** you want the ideas generated to be related as part of a process, not merely thematically related to your central concept.

# How to Use This Card + Another Card

## **Reverse Engineering + Subcommittees =**

After participants have their lists for *Reverse Engineering*, have them share their favorite ideas with the full group. Listen for shares that could be rolled into themes within the overall process (e.g., people involved, stages, content). Note these themes as you go. Then break the group into *Subcommittees* based on each theme, to expand on or clarify the ideas shared.

**Reverse Engineering + Sticky Note Generator + Urgent vs. Important Grid =** Instead of capturing their reverse engineering ideas in a list, have them generate stickies. After they're done, create a giant *Urgent vs. Important Grid* and have participants add their stickies to the grid.

**Reverse Engineering + Mindmapping =** After participants have all generated their own list, have them share ideas with the full group. Capture unique ideas on sticky notes. After everyone has shared, create a mindmap with the stickies, adding nodes for the themes that you see in their ideas. Alternatively, you could make a mindmap as people share, but the sticky notes make it simpler to move ideas around as themes emerge.



# FREQUENTLY ASKED QUESTIONS



Full Group



Clarification



Flipchart  
Markers

Prepare a numbered list of frequently asked questions on a flip chart or somewhere the entire group can see. Ask the group what question(s) they'd like to discuss or get answered (have them shout out the number of the question). Answer the question. Repeat.

## Longer Context

Before the workshop, or during a break, prepare a list of questions that you've noticed people in that type of workshop commonly have. They can also be questions that have come up several times already with the group, but you haven't yet addressed. The sweet spot is 5 - 8 questions, but fewer or more can work depending on your time constraints (more time for more questions).

Questions that are particularly great to consider for this list are those that people often want to know the answer to, but are afraid to ask. That fear often relates to participants feeling the question will reveal their own ignorance or bias about things they should already know or shouldn't be asking about. These are questions that you know participants are wondering, but might not ask aloud. They should also be questions that you *want* to answer — that answering them will help advance your goals, get you past a sticking point, or open up a door that might be worth exploring.

This might go without saying, but be sure that you have an answer ready for every question you put in the list (bonus: you can even practice your answer beforehand!). Don't include a question that you don't have an answer for, or are unsure about how to answer (unless that is, for some other reason, beneficial).

Write up the list of questions and number them. The numbers are important because it means that people can just shout a number ("Number 2, please!"), versus asking a question they might not want to say out loud. Sometimes having to physically say the words is a barrier to asking, and this setup allows you to remove that barrier.

When you're ready to jump in, put the list up, read through all of the items (in case participants are unable to read it themselves), and invite people to request a number that they want to discuss or have answered. Low-tech: write the list up on a flip-chart. High-tech: power-point deck.

## Why Full Group? Clarification?

The ideal is for everyone to hear the answers to these questions and to be on the same page. Many people who have these questions aren't readily going to speak up and the best way to make it more likely that they'll hear the answer is in the full group.

This tool is great for clarifying questions that have already surfaced or gone unaddressed during the rest of the workshop.

## For Pairs or Small Groups

If you want your participants to practice answering questions, having this list, and then having them answer the questions in pairs/small groups is a great strategy. Just be sure you bring it back to the full group so you don't let any wild answers go unchecked.

## For Emotion, Ideation, or Execution

If you want to use this tool for emotion or ideation, facilitate it in a way that invites the participants to be the ones answering the FAQs, so long as the questions themselves are opinion-oriented (for emotion) or suggestion-oriented (for ideation).

In general, this tool isn't useful for execution, but if you're working with a group that is comprised of several different decision-making constituencies, it might be useful to have them create offerings of FAQs for sharing and explaining their respective decisions with the full group.

## This Card is Great for...

**Answering the group's questions about hot-button, political, or loaded topics.** If you know an open discussion is going to be hard to contain, or unhelpful, and yet the group needs to address a particular topic, this tool creates the opportunity to do that in a contained, productive way.

**Surfacing questions that may be challenging to ask because of hierarchy or role.** There are certain questions that are intimidating to ask because of our role or position in a group. The structure of *FAQ* allows participants to ask questions without other participants attributing significant meaning to why they asked the question (i.e., it's not "their" question).

**Lowering the barrier to participation for your group.** When you're in a large group setting (which we'd say is anything over 20 people) participants get intimidated by the size of the group and are much less likely to speak up. Shouting out a number still allows the group to direct the conversation while the interaction being very low risk in front of a large group.

**Identifying the gaps in knowledge after a lecture or other information share.** After sharing a lot of information with a group, they might feel pressured to act like they fully understood and absorbed everything (lest they insult your efficacy in delivering the info). This tool invites them to highlight the specific information they still need by giving them explicit permission to ask follow-ups (i.e., you've put the questions up for them to ask, so obviously you're okay with answering them).

## Don't Use This Card if...

**You're facilitating a new thing.** This tool is really effective after you've engaged a lot of groups in a similar process, because you'll have a good sense of the questions the group is going to ask or would want to ask, and which of those are the "only one person wants the answer" versus the "only one person is willing to ask, but everyone wants to know the answer" questions. If you don't have a good sense of that, we'd recommend another tool like *Anonymous Q&A* instead.

**You need to get a sense of what everyone is thinking.** This is a terrible tool for learning what people are thinking because you're limiting their choices to just a few pre-determined outlets, and they aren't invited to participate beyond selecting the question. Go with an emotion tool like *Spectrum Questions* if you want to get a sense of where everyone in the room stands regarding a particular topic.

**There are a lot of "true" or "correct" answers to a given question.** *FAQ* only excels when there are specific answers that you want to share with the group. For the types of questions where multiple answers can be true, and creating space for those multiple truths is useful, we'd recommend *Case Studies* or *6 Thinking Hats* instead.

## Use This Card Instead of That Card when...

**Use *FAQ*, not *Anonymous Q&A*, when...** you want more control over what is going to be asked and answered. For example, when you're still getting comfortable with the content area you're facilitating, or you know that certain questions will derail the facilitation process. *FAQ* allows you to have control over the potential questions being asked while still giving



agency to the group to decide which ones they want answered.

**Use FAQ, not Fill in the Model, when...** a verbal explanation is enough to clarify the concepts at hand, and a visual reference or metaphor aren't necessary. FAQ is quicker, and you can cover ground more easily.

**Use FAQ, not Echoed Dialogue, when...** it's important that everyone in the group has a shared, universal, identical understanding of a concept.

**Use FAQ, not Fishbowls, when...** you want a lower-risk format for participation or want to give your participants a break from active participation.

## How to Use This Card + Another Card

**Anonymous Q&A + FAQ** = Give the group a prompt for writing their questions, "Please write on your index card a question you think that people in this workshop (or in previous similar workshops) have wanted to know the answer to. This question could be biased, ignorant, or feel like a 'stupid' question to ask. It could also be a question that you have and you'd like answered." Collect their cards and then take a 10-minute break or have participants work in pairs/small groups for 10 minutes. Look through the cards and create a numbered list based on the questions they submitted (picking and choosing based on your discretion). Then move into FAQ.

**FAQ + Dot Voting + Subcommittees** = Put your list of FAQs up on a surface that is dot-vote-friendly. Allow all of your participants to cast their votes for questions that they want answers to (limit the votes to one or two per person), then break them into subcommittees to answer the questions that get the most votes.



# DOT VOTING



Full Group



Execution



Sticky Notes  
Custom

After generating ideas and wanting to narrow down your focus, write the possible plans down on individual stickies and put them on a surface. Have the group “dot vote” by placing their dots (circle stickers, with markers, etc.) on the idea they support. You can vary the number of votes, how people can allocate their votes, and more based on your goals.

## Longer Context

To prep for *Dot Voting* take ideas and plans the group has identified they want to vote on and write them up on sticky notes, one idea per sticky note. Place these sticky notes in a place that is easily accessible for the group. Everyone will need to be able to see and to interact with the sticky notes. Writing with markers can help make the writing more bold and legible from a distance.

Before inviting participants to vote, read out the sticky notes out loud for everyone to hear (or ask a participant to volunteer to do this). You can do this in addition to having all the participants read the sticky notes before voting. Regardless of your method of review, do not have people begin voting until everyone has had a chance to review the sticky notes they'll be voting on.

Once everyone in the group knows what is on sticky notes, provide instructions and rules for voting. The instructions and rules should include; (1) where people should place their dots (2) how many votes each person gets (3) how they can allocate their votes. For example, "Everyone is going to have the next few minutes to cast their votes, everyone has five votes. You can split these votes up between whatever number of sticky notes you would like or cast all of your votes for one sticky note. You'll vote by placing your dot on the sticky note that you're voting for."

The dots can be made by giving people small dot stickers (easy to find at office supply stores) or by giving everyone a marker they can use to create a dot to cast their votes.

## Why Full Group? Execution?

This tool is full group because the focus is for all group members to decide what ideas or plans to focus on, providing a structured and relatively quick way to hear everyone's priorities among

a large set of options. *Dot Voting* enables simple decision-making and a clear way for the group to direct future plans.

## For Pairs

Pair people up with a partner. Let them know as a 'partner pair' they have a certain number of votes to cast and that they need to decide together how to cast their votes. Give them 2-3 minutes to discuss how they want to allocate their votes, then ask for one member of each pair to go up and cast their votes.

## For Emotion, Ideation, or Clarification

For emotion, give your participants dots or markers of several different colors, and create a bunch of emotion stickies (e.g., "excited," "nervous," "angry," "anxious," "happy," "content," "regretful"). Give the group a prompt, and ask them to put their (specified) color dot on the emotion that best describes how that prompt makes them feel. For example, "Using your green dot, tell me how you feel about..." Change the color and give another prompt. Repeat. After all the votes, note the different reactions to the different statements.

For ideation, you can reward participants with one dot per sticky note idea they generate for voting. If someone comes up with five ideas and gives you five stickies, they get five dots. Consider amending the rules to allow participants to put multiple dots on the ideas they love (to add more value to their extra dots). And be sure to decide beforehand whether or not you'll let people vote on their own ideas (in general, we suggest you forbid this).

For clarification, let people know that they aren't voting for the ideas that they want to advance, but for the ideas that they feel confused

about or want more information about. So, in the end, the most voted idea shouldn't be "the best one," but the most ambiguous, unclear, or in need of explaining.

## This Card is Great For...

**No-debate decision making.** This tool allows people to simply vote without explanation. There is no talking (other than to read out the sticky notes) between participants which can be a relief when a lot of decision-making processes are conversation-heavy.

**Reducing a lot of options down to a few.** You've done the hard work of generating all the ideas, this card allows you to reduce those ideas down to just the ones that are worth keeping around.

**Seeing the outliers.** In execution processes, it is easy to be focused on what most of the group wants, but there are times when it's important to know where are they outliers? What are things that only one person is thinking about or wanting? This tool allows you to assess the majority while also making it clear what is important to even just one participant in the room.

## Don't Use This Card if...

**It's important for participants to examine their own motivations.** In *Dot Voting* participants don't have to share or even understand the motivations for their decisions. When it's important for participants to have a clear understanding of their motivations and be able to share that thought process with others, we'd recommend 5 *Why's* instead.

**You want to know if people are yay or nay on every item.** If you simply need a "yes" or "no" on each idea from the group consider *Heads Down, Hands Up* instead.

**You want or need voting to be done individually.** If you think your group may be swayed by each other's opinions or reluctant to vote for what they truly want in front of each other consider *Rank Order Voting* instead.

**You want to make a final decision.** While this tool is great for narrowing the options down, the amount of options on the table and the lack of conversation within the group about their votes makes it an unhelpful last step. Consider *Vanishing Options* or *What's the MVP?* Instead.

## Use This Card Instead of That Card when...

**Use Dot Voting, not Vanishing Options when...** you want to be able to see the full spread of votes. *Dot Voting* allows you to see where the majority is, but also which items only had one or two votes.

**Use Dot Voting, not Finger Voting when...** you want votes to be anonymous. *Dot Voting* allows you to see everyone's votes without seeing what each person is voting for.

**Use Dot Voting, not Inside vs. Outside Thinking when...** you only want to focus on the opinions of the people in the room speaking for themselves.

## How to Use This Card + Another Card

**FAQ + Dot Voting + Subcommittees** = Put your list of FAQs up on a surface that is dot-vote-friendly. Allow all of your participants to cast their votes for questions that they want answers to (limit the votes to one or two per person), then break them into subcommittees

to answer the questions that get the most votes.

**SWOT + Dot Voting** = Have the group do a SWOT analysis, capturing the different sections on individual sticky notes. After participants to vote on what strengths and opportunities they have identified are most important to them for the final project to incorporate.

**Dot Voting + Vanishing Options** = Use *Dot Voting* to narrow the number of ideas or plans on the table. Then with those few final options, use *Vanishing Options* to narrow the final ideas down to one.

**Dot Voting + Inside vs. Outside Thinking** = Provide framing as you would for *Inside vs. Outside Thinking* prompting the group to consider the options on the sticky notes from an “insider” and “outsider” viewpoints. Have participants vote using one color dots to vote from an “insider” perspective and use different color dots to cast votes from their “outsider” perspective.