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EVERYTHING YOU NEED.

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THE WORKSHOP BOOK

PAMELA
HAMILTON

Design by Two Associates

PEARSON

'An outstanding how-to manual that is packed with expert digestible tips – highly recommended.' ALEX MAHON, CEO, THE FOUNDRY



How to design and lead
successful workshops

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CHAPTER ONE

An introduction to workshops

What is a workshop?

A workshop is a collaborative working session in which a team achieves an agreed goal together. The goal could be to solve a problem, create ideas, work through an issue or find agreement between team members.

Workshops differ from conventional meetings in that they use a structured creative approach and so have a different type of agenda and behaviours. However, workshop principles can be used to improve even everyday meetings.

Running a workshop is like being both the chef and the host of an important meal. Like any good chef, you wouldn't turn up to a kitchen and hope to find the right ingredients. Good meals, like workshops, involve careful planning and preparation, skill in the cooking of the meal on the day, as well as timely delivery of all of the courses to keep your demanding guests satisfied.

Workshops compete with people's time, so a workshop leader needs to plan and lead so that the goal is achieved within the time allowed.

Who can run a workshop?

Anyone can run a workshop, but with planning and structure you can lead a brilliant workshop. Meetings that need to create a specific output or decision require a leader who will take on an evolved chairperson role and super-charge the time for productivity and creativity, by turning the meeting into a workshop.

The workshop leader need not be the same person each time, nor the most important person in the room. They simply need to take responsibility for inviting the right people, planning how the time will be used, preparing stimuli to inspire ideas or output and leading the session in a way that keeps the whole team contributing throughout.

It is often the most passionate, organised or entrepreneurial people who volunteer to lead workshops, although less experienced and introverted people can do an equally great job with the right tools and planning.

Why workshops are useful in a digital world

Technology has given us efficiency, connectivity, access to information and greater potential for creativity. In many cases this has given us knowledge, research and collaboration that was previously impossible. However, our devices are making us more insular. We are often remote, spending less time face to face even when sitting in the same office. We are often time and attention starved.

We are much more likely to have clever ideas if we properly collaborate and curate them. Unfortunately, the way we now work in a digital world is a daily challenge to idea creation. Time to think is vital, but switching between tasks and technologies can distract us from progressive thought, and has been proved to limit our ideas and intelligence.¹ We need to be careful not to let technology disrupt the time and attention we invest in developing ideas.

Meetings in person have become more valuable to us, even if (and maybe because) we are busier and have less time to schedule them. We need to acknowledge the importance of our face-to-face time and make sure that we get the most out of our team members' interaction with each other.

Workshops provide structure

Modern business is more collaborative and less hierarchical than in the past. Traditionally a chairperson would prepare an agenda, refer to previous minutes and make sure the order of business was covered and actions agreed. Not all meetings need a chairperson, but when a meeting has to achieve a specific goal, it does need structure.

'A committee is a cul-de-sac down which ideas are lured and then quietly strangled.'

Sir Barnett Cocks

Unstructured meetings rely on group consensus rather than the leadership of one authority figure, and consensus-driven ideas are not always the best ones.² At worst, compromise can create blandness. A well-led workshop is the best way to help a team achieve a goal together.

Is it a workshop or not?

The word 'workshop' is used across industries to describe many different types of working session. However, the term is over-used. There are success factors that make a workshop, and danger signs that your session is not one.

Success factors that make a workshop	Danger signs that it is not a workshop
There is a clear objective to achieve.	There is no clear goal or output.
There is a reason why it needs to be a workshop.	The goal could be achieved in a regular meeting.
There is a clearly structured agenda.	It is a brainstorm.
It is designed and run by a workshop leader.	It is a collaborative session without a leader.
Everyone attending has brought some ideas or inspiration to the session.	People start thinking about the objective when they walk into the room.
The session brings new angles and fresh stimulus to the objective.	There is no new information or inspiration in the session.
People enjoy being there.	It feels chaotic or stressful to be there.
It enhances the team's collective intelligence.	It is dominated by one or two team members.
It stands alone as an event, and devotes the right amount of time to achieving the objective.	It is a small section at the end of a big conventional meeting.

Ask yourself

- ▶ Does technology distract your team?
- ▶ Do you feel some meetings would be better run as workshops?
- ▶ Do you think your team could be helped to be more creative or productive?

Design

Designing your workshop

The design of a workshop is as important as the delivery. This section will provide you with the reasoning behind structuring workshops in a specific way. Once the principles of workshop design are clear, you can create your own tools and techniques to suit your team and objectives.

CHAPTER TWO

2 The workshop approach

Workshops use a method of creative thinking. The creative thinking method is a way of approaching a topic in a new way, in order to find new solutions. We often hope that we will come up with great ideas immediately, but if we focus too early on finding the right answer, we cut short our creative thinking. We stop ourselves from creating truly great ideas if we limit how ambitious we are at the beginning.

'The best way to have a good idea is to have lots of ideas.'

Linus Pauling

The key to creating great ideas is to have lots of ideas first – even if most of the ideas are not right, they lead to others that are. Even if you are coming up with ideas that are too ambitious or impossible to implement, those ideas can lead to fresh thinking and solutions that are feasible. It is not possible to do creative thinking at the same time as evaluative thinking, and so a workshop leader needs to consider how to keep these thinking styles separate.

Creative thinking

There are four main ways of thinking that are applied in the creative process:

- 1 **Divergent thinking** is all about creative elaboration, going wide in thinking and exploring many options.
- 2 **Convergent thinking** is about narrowing down, choosing the right answers and prioritising ideas.¹
- 3 **Analysis** is applying your knowledge and expertise to the idea themes and working out which are the most important elements that need to be expressed clearly.

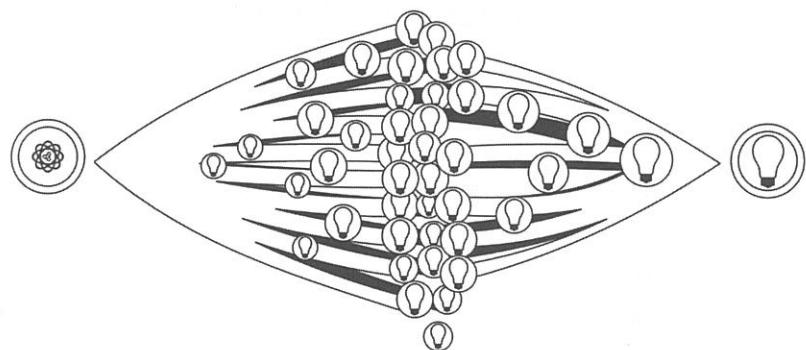
4 Synthesis is the expression or wording of those ideas in a manner that makes them clear and easily understood by other people so that they can be acted upon in some way.

For every workshop, whether for 10 people or 100 people, there is a simple method that applies these four styles of thinking – see the table below. This method can be applied over two hours or even two days, on any topic.

	Purpose	Approach	Thinking style	Output
Stage 1: CREATE (60% of the workshop time)	To create many options and possibilities of early ideas.	Apply creative thinking in several rounds of idea generation.	Divergent thinking, creative and spontaneous, creating many possibilities, with no evaluation or critical thinking.	An extensive list of ideas and directions.
Stage 2: EVALUATE (10% of the workshop time)	To look at all the options and consider the best individual ideas and any themes within the ideas.	Discuss as a team, identify key themes or vote on favourite ideas.	Convergent thinking, evaluating the ideas against objectives and feasibility, and choosing the best themes or options for further development.	A list of important idea themes and some of the best individual ideas.
Stage 3: DEVELOP (30% of the workshop time)	To take the best ideas and themes and develop them into fully thought-through ideas.	Choose the top ideas and split into teams to develop these further.	Analysis and synthesis, working through the top ideas and themes to combine the best elements and express the essence of the idea.	A short list of the best ideas, well expressed and clear, with ideas for actions and next steps.

In the early stages of creative thinking there is no ‘right’ answer. It is in the journey of searching for and creating many answers that creativity blossoms. Every workshop, whether it be strategic or creative, will be more successful if

it is designed to allow the team to think divergently first, then convergently.² This is because divergent thinking helps create lots of possibilities that are generated without limitations. Once there are many ideas on the table, convergent thinking can be applied to link and theme them into some key ideas.



Divergent, convergent

Workshop ingredients

There are key ingredients that make a workshop successful. We will cover these in much more detail in the following chapters.

For successful design:

- ▶ **Structure:** plan exercises in small teams to allow the topic to be approached from different angles by different groups of people.
- ▶ **Diversity:** invite a range of participants to make sure you have a team with diverse genders, backgrounds, opinions and ethnicities.
- ▶ **Stimulus:** create inspiration from new or unusual sources to bring topics to life or stimulate thinking beyond the obvious.

For successful participation:

- ▶ **Prep task:** use time wisely by having the team do some thinking in advance and bring ideas with them to kick-start the session.
- ▶ **Focus:** consider how to keep people focused and thinking deeply by being careful not to overwhelm them with information and keeping outside distractions (such as emails or phone calls) to a minimum.

- ▶ **Behaviour:** encourage positive, constructive behaviours such as conversational turn taking within the workshop.
- ▶ **Conflict:** plan for constructive conflict, polarised views and challenges as a healthy process to create ideas.

The following chapters in Design, Lead and Action will give you much more detail on how to use these for your workshops.

Ask yourself

- ▶ Are we creating enough ideas before we choose the best ones?
- ▶ Are we looking at the issue from several different angles when we create new ideas?
- ▶ Have we separated the creating from the evaluating in the session?

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CHAPTER THREE Setting the workshop objective

Unlike everyday meetings, workshops are set up for a specific goal, to solve a problem or to create a defined output. This means that you need to be very clear about what you want the workshop to achieve. Investigating the issue and working out the goal of the workshop improves the workshop design.

The way you ask the question has a big influence on the way the question will be answered.¹ Defining the objective properly means you will set up the workshop for greater success.

Plan with the main stakeholder

Identifying your key stakeholder or ‘problem owner’ is important. This could be your boss, the person who asked you to lead the session, your client or your fellow team members. The stakeholders are people who will brief you, work with you on the approach and challenge you to get the best from the team. This means spending time working through the issues and objectives with them.

Be wary if there’s no stakeholder committing to the workshop or taking the actions afterwards – chances are the workshop won’t achieve its objective. If they are a ‘problem moaner’ (would prefer to spend time on what the problems and barriers are) instead of a ‘problem owner’ (wants to invest time in solving the issues and moving to action), then the goal may not be met.

In my experience, if stakeholders don’t want to commit time or attention to working through the approach, they will show the same lack of commitment during and after the workshop, which means the workshop will not be successful.

'By failing to prepare, you are preparing to fail.'

Benjamin Franklin

Lesson learned: finding the real stakeholder

The least successful workshop I ever led was for a global household cleaning company in its Asian markets. I'd spent some time working with my client on the objectives, the session outline, the stimulus we would use and the approach we would take. I flew out to Malaysia and walked into day 1 of the workshop only to realise, too late, that the client I had prepared with was not the real stakeholder. Her boss was, and he did not want to be in a workshop.

I did my usual enthusiastic set-up of the session, talking through creative behaviours and approaches. He stayed on his laptop without participating at all, except when he heard an idea he didn't like, when he would dismiss it loudly and go back to his emails. His team said less and less, and I tried my best to keep going, hoping everything was going to work out. Unsurprisingly, the workshop did not work. I realised too late that my client was trying to use me to influence her boss, but without being prepared for that I could not.

What should I have done instead? I always ask who else will be in the workshop and make sure I understand their role and influence. I make sure to talk with the bosses before they attend, and check they will participate constructively. After the first hour of the failing session, I should have said to my client that the workshop was not going to succeed and either given the team their time back to use how they wanted to, or asked the boss to leave us to it and come back when we'd created something.

Finding the real objective

Workshop leaders have a privileged position of influence. Even if your stakeholder is your main client, you have a responsibility to everyone in the workshop to help them genuinely achieve something as a collective. Workshops are collaborative processes, and they are powerful because people leave feeling they have created something together. Your stakeholder should be prepared to accept the team's ideas rather than simply trying to push their own.

It is sometimes hard to establish the real objective behind the stated one. For example, your stakeholder may say they want an alignment session, when

they really want to make the team agree with their view on how to move things forward. Or you are brought in to run a strategy workshop but what they really need is a team-building session. If you can see that there are hidden or unstated objectives in play, explore those with the team members in advance.

'How to...' tool

A very simple exercise I often use is the 'how to...'

- 1 Rephrase the workshop objective as a sentence starting with 'How to...' Come up with as many statements as possible – at least 10, if not 20, so that you think divergently about the goal and go beyond the obvious.
- 2 Write each of your statements on a separate Post-it note.
- 3 Group your Post-its into similar groups.
- 4 Choose the group you feel best represents the opportunity that the workshop creates and rewrite the objective based on that group.

You can also run this as a workshop exercise with the whole team, within a workshop, if you want them to create an objective or question that is inspiring and directional.

A 'How to...' example

Initial objective: 'The goal of the workshop is to understand the customer survey feedback and create some ways for us to improve our service in future.'

Rephrase this in at least 10 'how to...' statements, for example:

- 1 How to make sure the team understand the feedback.
- 2 How to make sure the team don't get stuck in the negative and can move onto ideas for improvement.
- 3 How to keep the team encouraged and constructive despite the negative feedback.
- 4 How to use the negative feedback as an opportunity for new ways of working.
- 5 How to make sure the team understand the impact of their actions in the past and work out how to make things better in the future.



- 6 How to make sure we don't get into this situation again.
- 7 How to make sure we create a completely positive customer experience in future.
- 8 How to make the team proud of themselves and the service they provide.
- 9 How to make sure the team feel responsible and accountable for the ideas they create.
- 10 How to make our team champions of a new, positive customer experience.

Once you've done this you will see that it gives you inspiration for a more exciting, meaningful and inspiring objective, which goes some way to directing the outcomes to be more successful.

As a result of using the 'how to...' tool we could then rephrase the goal as 'the objective of the workshop is to use the customer feedback to inspire ideas that will positively transform the customer experience'.

Can you be both stakeholder and workshop leader?

I believe you can be the leader and the stakeholder, but be very careful in doing so. If you are trying to influence people to do something differently, or if the topic is one they are reluctant to discuss, you are probably not best placed to lead the workshop, because the team won't trust you to do so impartially.

Your main role is to help the team to create and align together, not to impose your view. Will you accept the output if the team create something different from what you believe is the right answer? If so, then go for it. If not, brief someone else to lead the workshop for you; then at least you can participate and give your opinion strongly.

Can you lead and participate in the same workshop?

No. I strongly believe that the workshop leader needs to stay separate from the working group, in order to keep an overview of the session, check participants are on track and sort out any issues. It is very difficult to lead well and

participate well at the same time. If there are sections in which you'd like to participate, have another workshop leader who can step in at that point and let you take part.

Ask yourself

- ▶ What is the objective of the session?
- ▶ What are the specific physical, deliverable or political outcomes of the session?
- ▶ How do you want the participants to feel during and after the session?
- ▶ What has worked well or not so well with this team in the past?
- ▶ What type of tone or personality would you like the day to have?
- ▶ What would you like people to say about the event afterwards?

Lead

Leading your workshop

Leading a workshop can be enjoyable and rewarding. Anyone can lead a workshop, and so long as they are well prepared, they will display the necessary confidence because they know they've devised the best use of people's time. This section will help you prepare to stay in control and keep participants focused, and give you the best likelihood of workshop success.

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CHAPTER SEVEN The workshop leader

There is a certain type of alchemy that happens when you bring together the right people, in the correct setting, with good inspiration and great timing. Although much of the work happens in the design of the event, the workshop leader ignites these ingredients into the best ideas. The best workshops feel enjoyable for participants, and the best workshop leadership seems effortless and authentic.

Being an authentic workshop leader

Anyone can be a great workshop leader. If you have prepared well, you will be confident in your workshop delivery. More than confidence though, people want to trust you as their guide, so consider how to get your delivery just right.

The main lessons I've learned are:

- ▶ Be yourself – there's no need to invent a new personality.
- ▶ Be confident and positive, but not over-zealous or wildly optimistic.
- ▶ Be professional and in control, not too cool or creative.
- ▶ Be kind, polite and empathetic, never strict or shouty.
- ▶ Be flexible – don't stick to your plans if they are not working.

The best workshop leaders use influence rather than status because they are there to empower the team to collectively create a way forward, in service of the group.

'Our job is to set the stage, not perform on it'

In a 2014 *Harvard Business Review* article entitled 'Collective genius', Linda Hill and her colleagues lay out three critical aspects of creative leadership:¹

- 1 Creative abrasion – creative leaders who can drive debate, inject honesty and amplify differences of opinion within a team to get to a creative outcome.
- 2 Creative agility – creative leadership that encourages discovery-driven learning, making sure participants test and refine their ideas, and experimenting until the ideas are better.
- 3 Creative resolution – how creative leaders encourage multiple ideas and diverse perspectives to live alongside each other until the best solutions emerge, rather than conforming or deciding too early on a direction.

As workshop leaders, we need to set up the ingredients for collective genius in the tasks we prepare, the tools we use and the people we invite to participate. Workshops are the ideal space in which the three aspects of creative leadership can be used successfully.

What motivates you to lead?

Here are some common motivations that you might have for wanting to lead, and advice to consider:

Motivation	Advice
Are you an organised person wanting to make your team more organised?	Lead sessions that structure time efficiently but allow people some latitude in how they use that time, so they don't feel your approach is too rigid.
Are you a senior manager who wants your team to take more initiative?	Split up the workshop into sections and have your team (individually or in pairs) run one of the sections of the day, preparing the stimulus, inspiration and leading the workshop under your guidance.
Are you new to a team and have good ideas but unsure of how to influence others?	Ask an experienced team member to work with you to design and lead a workshop for your colleagues to participate in creating ideas with you, so they hear your ideas and contribute their own.
Are you under pressure or overworked, with no time for creativity?	Lead regular, short, well-planned sessions, and rotate the leaders to keep up energy and curiosity despite work pressure.

Motivation	Advice
Are you working on such important issues that it is essential your work reaches people better?	Lead your team in looking outside for inspiration on how to truly engage the people you need to reach.
Are you working in a sick or bureaucratic business culture?	Get permission from your team to test the workshop approach in a time-limited session on an important objective, to show how productive teams can be if they behave in the right way.

How to be a better workshop leader

Use your physical and verbal presence to keep momentum and control in your workshop. It will keep the workshop feeling enjoyable because these are subtle and polite cues that prevent you from having to be strict or serious. They are especially useful to control the time it takes for people to talk in turn, present ideas to each other, or give their observations to the whole group.

Physical

- ▶ **Organise the room yourself.** This means choosing and setting up the space to work with your design.
- ▶ **Move around the room** as people speak, so that you are part of the group (standing at the front of the room removes you from the group).
- ▶ **Move towards people who are speaking** as they talk, giving them encouragement and attention. When you want someone to finish their point, move slowly closer to them, which has the effect of helping them to finish their sentence more quickly.
- ▶ **Use the hand.** If you are still unable to make someone end their point, once you are very close to them slowly raise your hand, palm towards them, and smile politely – this works well to close off their point and let someone else talk.

Verbal

- ▶ **Welcome everyone individually** as they arrive at the session, shaking their hand and introducing yourself as the workshop leader.
- ▶ **Make a clear start.** Make sure everyone is listening and say 'HELLO!' in a loud, clear voice, with a smile. Then pause and wait for people to

- reply. People smile back when you do this, and most say hello back, too. Thank people for giving up their time to come to the session and explain how important it is that everyone concentrates and participates fully.
- ▶ **Wait for quiet.** Wait until there is complete silence before giving any instruction, to keep the team clear on what needs to be done and to reinforce your control of the workshop.
 - ▶ **Let people contribute as early as possible.** If you have time and the group is not too large, it is always worth letting them introduce themselves to give everyone a voice at the start of the session, so that they are contributing immediately. I often ask what they would like the workshop to achieve and write down these points to refer to at the end of the workshop, to see if we managed to achieve them.
 - ▶ **Give positive feedback.** When people are sharing ideas, even if you are listening intently, do not stay quiet. Sharing ideas can be scary for the person who is talking, and the workshop leader should be as encouraging as possible with everyone and every idea. Keep giving positive verbal feedback throughout, saying 'yes', 'great idea', 'well done', 'that's good!', etc. This keeps up the momentum as it interrupts monologues and helps people move onto the next point, and it allows you to politely interrupt people when they've talked for too long, with phrases like 'thank you' and 'great' said in a tone of finishing and moving on.
 - ▶ **Reflect on ideas.** A way to make people feel really good about their ideas is to reflect on them, saying something like 'I really like that idea because...' or 'that makes me think of a new idea such as...'
 - ▶ **Be polite.** Keep your tone calm, kind and friendly. Don't shout over the group for any reason.
 - ▶ **Be an example** with your own mood, tone and demeanour. Be confident, calm, positive and energetic, and people will reflect this back to you.
 - ▶ **Listen but don't interfere** in breakout groups. Listen and check in with them to see if they have the information they need and are clear on the task, but don't interfere in breakout discussions unless invited to do so by the team. It can worry people and distract them if they feel they are being watched or interrupted.

- ▶ **Don't panic people.** Try not to put people under pressure, even if you do need to keep to time. Instead of saying 'you've got five minutes left!', talk to each group in turn, gently asking if they are ready to move on and explaining there are about five minutes left for this task.
- ▶ **Focus your words** on what you want people to do (rather than what you don't want them to do).
- ▶ **Give reasons** for each instruction so people understand why they are being asked to do something in a certain way.
- ▶ **Close the session** by asking for one comment from each person before they go, for example something they feel has been achieved in the session, or something they are still concerned about. This helps encourage people to share something positive in front of each other (which reminds everyone that they have used their time wisely), but also allows them to express concerns openly (instead of grumbling afterwards).

'Leading effectively is less about mastering situations, or even mastering social skill sets, than about developing a genuine talent for fostering positive feelings in the people whose cooperation and support you need.'

Goleman and Boyatzis

Ask yourself

- ▶ Are you committed to helping the team work collaboratively?
- ▶ Will you be comfortable allowing the group to define the next steps collectively?
- ▶ Do you mind not participating in the breakout groups?
- ▶ How can you use your physical and verbal presence to make the workshop feel effortless?

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CHAPTER EIGHT

Workshop behaviours

The way we behave in groups can improve the quality of ideas we create. If we behave in the same way as we do in everyday meetings, we will come up with the same ideas. Because workshops are an approach to find fresh thinking, it is important to ask people to behave differently to enable the fresh thinking that produces good ideas.

Collective intelligence

Collective intelligence research at MIT identified three factors that correlate with collective intelligence (the ability of a team to come up with better ideas than the most intelligent individual in that team).¹

- 1 **Conversational turn takers:** having people in the workshop who are good at listening and speaking in turn, making sure everyone is able to be heard and all views are considered.
- 2 **Digesters:** having people who are able to digest, understand and empathise with other people's ideas rather than only think about their own.
- 3 **Women:** a good balance of women in the group helps because they tend to be more likely to take it in turn to speak and listen to others.

Clearly set up behaviours for the participants at the start of every workshop, even if you know the participants are familiar with them already. Explain each behaviour and the reason it is so important.

Behaviour required	Unacceptable behaviour	Reasons why
Create lots and lots of ideas first.	Trying to get to the right idea immediately.	Any idea can lead to new ideas and so creating the wrong idea is not a waste of time. Every idea will be leading us to better ideas.
Assume anything is possible.	Saying an idea will not be possible.	We can't mix creative thinking with evaluation, so don't evaluate the ideas or criticise them until we have created lots. If an idea is not possible, add to it with a better idea that is.
Be constructive and build on other people's ideas.	Being critical about other people's ideas without suggesting better ones.	It's much easier to focus on what's wrong with an idea instead of building on it or improving it. If you don't like an idea you hear, give a better one, or say nothing. Some people will be discouraged when their ideas are criticised and they might not contribute any more.
Write it down.	Intending to say an idea later when you get the chance.	Because we are creating lots of ideas, it's easy to forget some, so be sure to write down any thoughts you have and share them.
Write it again and again until it's right.	Stopping yourself or someone else from writing down an idea because it's not yet perfect.	It is better to write down something immediately and keep adding new versions of it until you are happy. Trying to perfect an idea that does not exist yet stops creative flow.
Don't look for consensus.	Stopping people in the group from writing down an idea until you all agree on it.	We want as many ideas as possible. If you are working in a small team, you don't all need to agree on each idea that's written down. If you have opposite ideas, write both down. This is a spontaneous process, not an evaluative one.
Use 'yes and' and 'how can we...' to build on an idea instead of criticising it.	Saying 'yes but', 'we've tried that before', 'that's too expensive' or 'that will never work'.	In the spirit of being constructive, turn any critical points into constructive questions such as 'how can we make that less expensive?' or 'how can we make that more feasible?', or simply build on an idea by saying 'yes and...'
Be present; don't check phones and laptops.	Checking phones, emails and laptops, or having phones and laptops sitting on the desk during the workshop.	In order to be able to focus properly, we need to be fully present and not multi-tasking. People find it hard to focus on more than one thing at a time. Please feel free to leave the room if you have urgent things to check, but put all phones and laptops out of sight during the workshop.
Use real people's language.	Using technical jargon and company-specific acronyms.	Expressing ideas in normal, everyday language means we are able to get across the meaning behind ideas in a much more straightforward way.

Workshops take us away from the distractions of technology

- ▶ Research has shown that we get pleasure from novelty,² so looking for new messages on our phones and laptops becomes addictive as we get a shot of dopamine, the brain's pleasure chemical, each time we see someone has sent us something new. Because people are addicted, it's hard to make them stop and focus in everyday meetings. Workshops provide a structure and space that help people to focus properly with all their attention.
- ▶ Neuroscience research has proved that multi-tasking itself does not exist.³ Scientists measured people who 'multi-tasked' versus those who focused on single subjects. Those who thought they were multi-tasking were in fact doing what is called 'rapid task switching', with lower intelligent output as a result. Our multi-tasking makes everyday meetings less effective, which is why well-planned workshops are vital for making the most of the face-to-face time we do have.
- ▶ A recent study showed that in some companies people are spending 40 per cent of their time getting through their emails, which means in a five-day week we would start work on a Wednesday.⁴ This makes it hard for people to feel comfortable sitting in a meeting without catching up on their emails. One of the main success factors for a workshop is that people are taken away from answering emails and are able to focus and collaborate, without distractions.

Ask yourself

- ▶ Does the group of people coming to the workshop contain conversational turn takers, digesters and women?
- ▶ How can we minimise distractions?
- ▶ Have you clearly set up expectations and behaviours for the day?
- ▶ Will the people coming give the workshop their full attention?

Action

Putting workshops into action

Action pulls together the Design and Lead principles into workshop plans. Each chapter in this part of the book is based on a type of workshop objective, with tools and an example session plan for your reference. These outlines should guide you to create your own versions of tools and plans to suit your workshop objective.

11

CHAPTER ELEVEN Basic workshop tools

Use for: helping people to create fresh ideas in any workshop

When we are good at our jobs, the experience we have built up over time means that we take in relevant information and make decisions faster. Unfortunately, these habits prevent us from coming up with new thinking and fresh ideas.

The workshop objective: to create new angles from which to look at problems, using workshop tools

These new angles help people think in non-rational and non-linear ways, to avoid their brains from following the same habits of thinking. They help even very experienced people to look at the same old problem from a fresh angle.

'Every child is an artist, the problem is staying an artist when you grow up.'

Pablo Picasso

Consider a one-year-old child who has not yet formed many habits. If a one year old sees a shoe, for example, they might think it's a hat, or a boat to play with in the bath, or something to chew on. Over time the child learns that the shoe goes on her foot, and that association gets stronger and stronger as it is repeated so that she can get dressed in the morning without too much fuss.



The brain tree (see page 65 for a full explanation)

The same thing happens at work. We get better at our jobs by repeating the same associations and ideas, and the pathways we use to do this become stronger and help us make faster decisions.¹ This is great for our jobs because

those patterns build our ability to deal with the same experience successfully in future. However, it also means that people find it hard to see new ways of approaching problems, particularly if they are very experienced at their job or have worked in the same way for a long time.

Why we need workshop tools

Workshop tools are like a holiday for the brain. They take people away from the objective or problem, then give a fresh perspective when that objective is re-visited. Workshop tools create fresh and relevant angles.

As the workshop leader, consider how to structure your session in a way that helps the team to look at the problem from new angles. There are many tools that can be used within a workshop in order to encourage people to be more creative. Here are some examples of the tools I use regularly.

Magazine cut-outs

- ▶ Buy lots of magazines related to your topic or customer.
- ▶ Ask people to cut out any headlines, words, themes or pictures that leap out at them, very spontaneously.
- ▶ Then ask the team to group the cut-outs on some flipchart paper, creating some common themes.
- ▶ Split the team into smaller groups, each taking one theme, and use that theme and the words and images within it to inspire some new ideas for the objective.

Top tunes

- ▶ Prepare a playlist of songs that relate to your topic or customer.
- ▶ Play one song after the other while people listen and write down any words, phrases, memories or emotions that occur to them during the songs.
- ▶ Split the team into pairs and ask them to share their notes with each other and use the notes to create new ideas.

Bookstore brainstorm

- ▶ Take your workshop to a big bookstore.
- ▶ Allow the team to explore the bookstore for 30 minutes with the workshop objective in mind, taking notes or photos of relevant language, titles or other information that relates to the topic in some way.
- ▶ Put the team into small groups to share their notes and photos and use these to create some new ideas.

Letter ladder

- ▶ Seat the team in a circle, giving them each a blank sheet of paper.
- ▶ Ask them to write down five words associated with the topic down the left-hand side of the paper.
- ▶ Each person passes their paper clockwise.
- ▶ With the new sheets, each person uses the words written on the left-hand side to trigger some new ideas or angles which they write down in the right-hand column.
- ▶ Get the team into pairs and ask them to share their sheets, angles and ideas, and use these to create some new ideas.

Fresh eyes

- ▶ Prepare either a list of well-known personalities or a list of successful organisations that relate to your topic in some way.
- ▶ Split the team into groups of three and ask them to choose one personality or organisation to work on.
- ▶ Ask each team to consider how this personality or organisation would approach our topic area, listing at least 10 different points for how they might do so.
- ▶ Use those 10 points as inspiration for new ideas on the topic.

Planning to use workshop tools

Using workshop tools involves three stages. All the exercises and session plans in this book follow this pattern. As a workshop leader, separate the

instructions to your team per stage. Give just the instructions for each stage, one at a time, before giving the next, as follows:

Stage and leader's instruction	Explanation for this stage
1 Now we are going to put the workshop objective out of mind for a bit while we do a small task.	This is to give you some new angles to think from. Don't be worried about the end goal at this point.
2 Give the instructions for the tool, so that the team create new angles, none of which needs to make sense for the topic yet.	This is about generating a wealth of new angles to choose from – the more you create, the more possibilities you have for inspiring new ideas.
3 Use the new angles as inspiration for new ideas that relate back to the workshop objective. Focus on the ones that give you new thoughts and create some ideas for those. Choose some absurd angles as well as some obvious ones to generate ideas from.	Now use the new angles to look at the topic from a new perspective, even if absurd, in order to disrupt your brain habits and create unusual and innovative ideas.

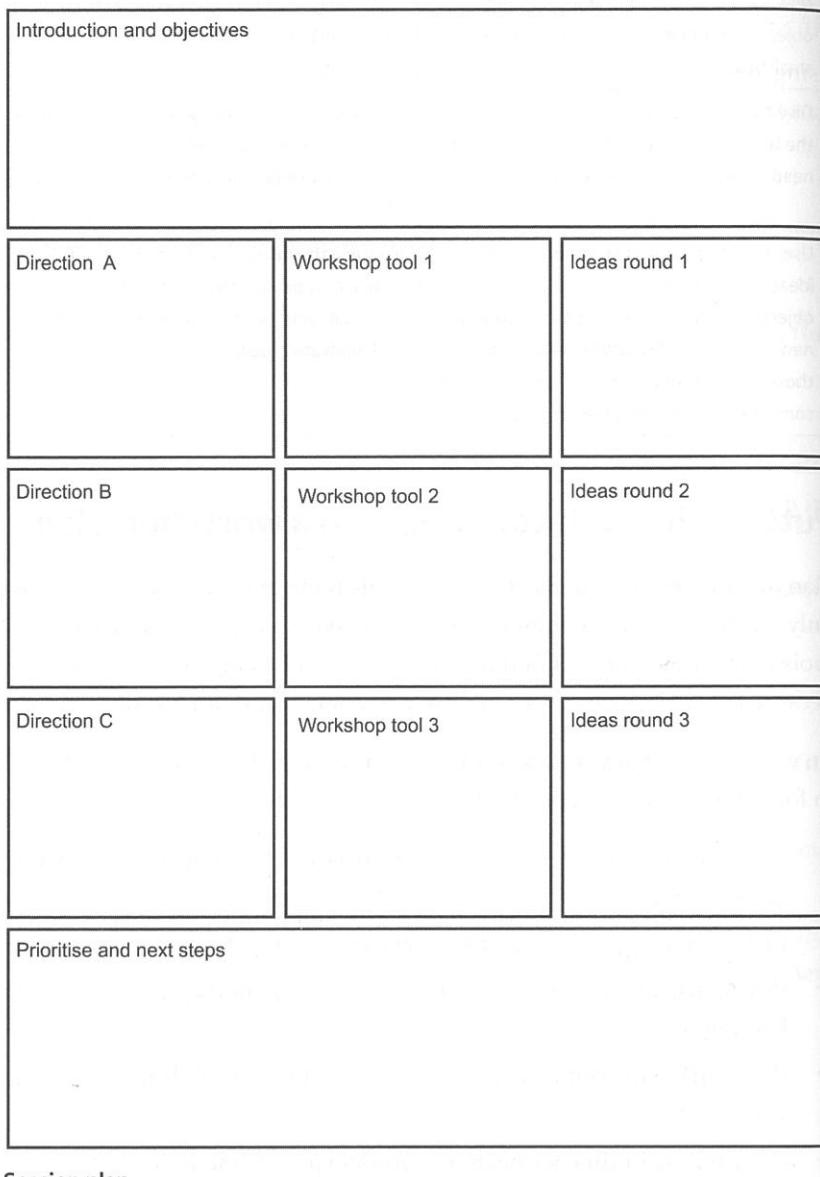
Putting the tools together into a workshop plan

Plan to cover several rounds of generating ideas in your workshop. If you have only one hour, then one round is fine, but if you can apply at least a couple of tools to the topic, you will find that the quality and volume of ideas are better because they've been approached from a few angles and not just one.

An easy way to plan your session is to identify three possible idea directions to focus the ideas on. For example:

- ▶ three different target customers to consider (e.g. child, parent, grandparent)
- ▶ three different product issues to solve (packaging, formulation, storage)
- ▶ three parts of the business to improve (front of house, shopfloor staff, loading bay)
- ▶ three different contact points with the end user (helpline, website, in store)
- ▶ three points in time we need to consider (past, present, future)
- ▶ three values we believe are important (transparency, efficiency, quality).

Then, for each of these three topics, use a different workshop tool to bring fresh thinking to that particular topic. Finally, consider what kinds of ideas you want out of each round. Putting these together in a plan would look like this:



Example of using fresh angles for new ideas

If you were a shoe company looking for new shoe ideas, you'd find it hard to look beyond the shoe-foot association. Instead, if we approached the topic from a new angle, as a one-year-old child might, we could take each new angle and use it to inspire new shoe ideas, as follows:

Using 'hat' to inspire new shoe ideas:

- ▶ because it protects from the sun, ideas for shoes that contain UV sensors to warn you about sun damage on your run
- ▶ leading to an idea about vitamin- or energy-infused pouches that refresh the muscles in your feet over a long run
- ▶ leading to caffeine-infused shoes that give you energy while you run
- ▶ leading to shoes you put on after your run or a long day on your feet, to revive and comfort them.

Using 'boat' to inspire new shoe ideas:

- ▶ because it is about water, shoes that are both breathable and waterproof, letting moisture out, not in, during sport
- ▶ leading to shoes for boating and sailing that dry fast after being in water
- ▶ leading to shoes that help you walk on water by displacing puddles and rain as you walk through them with a mild hydrophobic action.

Using 'something to chew on' to inspire new shoe ideas:

- ▶ because it's about food and energy, shoes that contain a kinetic action that is driven by movement, so that you can charge your phone or generate energy based on the amount your feet move
- ▶ leading to an idea of measuring the movement of thousands of people who commit to exercising more, using sensors in their shoes that are linked to discounts in their health insurance premiums.

Ask yourself

- ▶ Have you thought about how to create new angles before creating ideas?
- ▶ What tools will help you create the right sort of ideas?
- ▶ Have you prepared several different rounds of ideas?

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CHAPTER THIRTEEN Creating quick ideas

Use for: creating a set of quick ideas in a short space of time

If you don't have a lot of time to prepare, or you plan on running a very quick session, you can design a basic workshop plan and lead it well to get quality ideas. Quick ideas sessions can be fun because you don't have any of the challenges of a long workshop, such as keeping the energy up or stopping people getting bored. Even for a quick session, however, you will still need to invest some time in preparation.

The workshop objective: to create quick, quality ideas in a short space of time

The key to a quick ideas session is to use most of the time for creative (divergent) thinking and do evaluative (convergent) thinking afterwards.

Creative thinking is best done in a group, with all the energy, stimulus and momentum that comes from collaborating.¹ Evaluation can be done individually or by a small group and shared more widely for comment.

This means that if you have only an hour, you should spend it on two or three rounds of idea-generation sessions, getting out the most divergent thinking, and save the evaluation and convergent thinking for later.

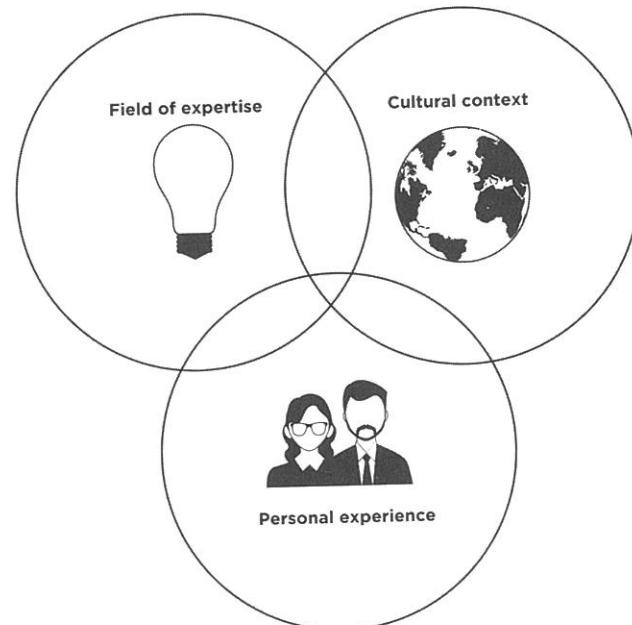
What makes people creative

There is a temptation to label an individual 'creative' rather than calling the process the individual might undertake 'creative'.² Of course, some people find being creative easier than others. Creativity, however, is something that happens beyond the individual level. Research into successful artists, scientists and entrepreneurs

shows that creativity happens only when people combine their personal perspective with their field of expertise in response to a cultural context.³

There are three ingredients that make creativity happen:

- ▶ **Personal experience:** the individual who brings their unique personal talent and perspective to the topic (including family background, personality traits, social circumstances).
- ▶ **Field of expertise:** the domain and body of knowledge in which the individual is working to create the ideas (the business they work in, their area of expertise, their role in the team, the organisation they belong to).
- ▶ **Cultural context:** the cultural context in which the individual and domain sit (the society they live in, the economics and demographics happening at this time, the trends that people are affected by).



Ingredients of creativity

Often when people try to create new ideas they tend to focus on their field of expertise – what they already know, the area of business they work in, what they have done already – and use that to inspire the answer. However, to make the conditions right for creativity, workshop leaders must enhance the *personal experience* of every individual in the room, as well as the inspiration offered by bringing in the *cultural context* of the topic, in addition to referring to the *field of expertise*.

Prep tasks for participants

A good way to enhance both personal experience and the cultural context for your workshop is to ask each person attending to do a prep task.

If you walk into the room with the same people and look at the same information, you will come up with the same answers. As well as inviting different people to participate, be sure to bring fresh information to inspire the team that brings in culture, personal experience and their expertise at work.

Always ask the participants themselves to help with the stimulus via some prep tasks, for example:

- ▶ **Personal experience:** ask people to bring an example of a product, service or experience they have recently had and be prepared to talk about it (this should be related to the topic, so for example if your workshop is about improving customer service, ask them to bring an example of when they have personally had a wonderful or terrible customer service experience).
- ▶ **Field of expertise:** ask people to look at their expertise from a new angle (for example, explain a technology as if explaining it to a child, or look at the competition and what they are doing – anything that takes us beyond the obvious information we usually look at).
- ▶ **Cultural context:** invite people to bring an example that represents a trend or cultural phenomenon of the time, either a small fad or a big movement, and be prepared to talk about what they think are the reasons for its existence.

The story of Paraffin Young⁴

My great-great-great-grandfather was James Young, who invented the process by which paraffin was distilled from coal into a solid wax. Young patented this process in 1850 and became one of the most famous Scotsmen of his time. He was nicknamed 'Paraffin Young' and went on to sponsor his friend David Livingstone to explore Africa.

Young was not born a creative genius. He was an apprentice joiner while he studied at night school before becoming the assistant to a chemistry lecturer, Thomas Graham. He then embarked on his own career in chemistry. When working in an oil mine, he noticed that oil was dripping from the sandstone roof. This observation led him to develop the distillation method by which paraffin was extracted from coal.



- ▶ **Personal experience:** Young had a wide range of experience, creating a large variety of ideas beyond chemistry and coal for most of his early life. He was an entrepreneurial and inventive talent.
- ▶ **Field of expertise:** Young was surrounded by mentors, experts and other inventors, such as Thomas Graham, who began early work into the technology now used in kidney dialysis. Young had worked for years to build his knowledge of coal and natural petroleum before inventing paraffin.
- ▶ **Cultural context:** Young lived at a time when scientific advances were moving at an unprecedented rate. The time was right for new ideas and patents, and he happened to make the most of that context to create a product that is still used around the world today.

The same kind of story can be told about Mozart, whose personal talent was enhanced by the other musicians who inspired him, the patrons who supported him and the times he lived in.

'Creativity isn't about making things, it's about making things happen.'

Tanner Christensen

Theming tool

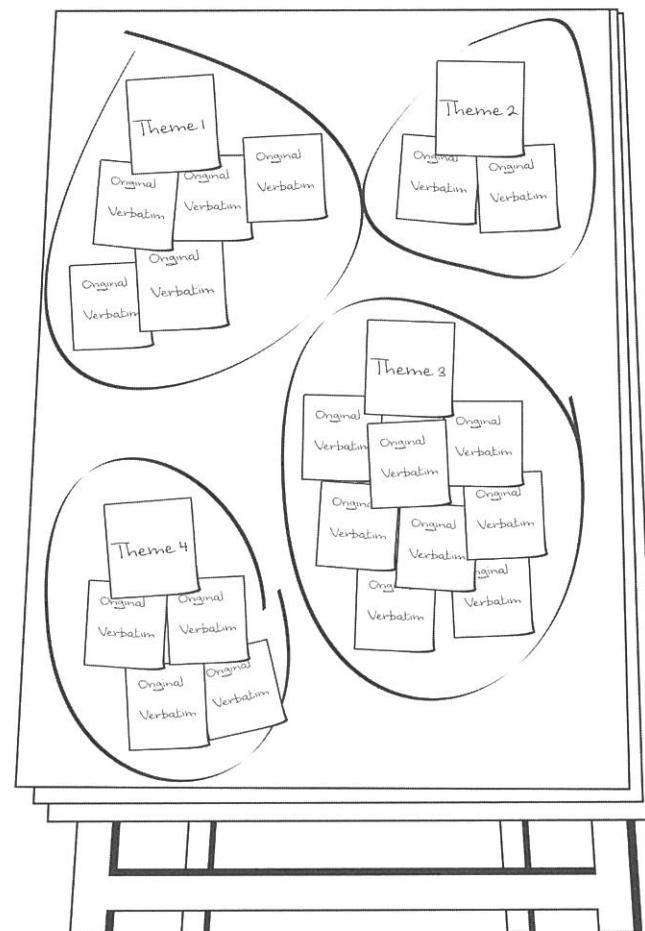
The theming tool is an easy and effective tool I use in every workshop. It is simply grouping together ideas by having them written on separate Post-its, which can then be moved and put into themes. These visual themes become new angles for people to focus on. Theming is a perfect tool to use to turn prep tasks into stimuli ready to use in the session.

How to theme

- 1 Ask participants to individually write down on individual Post-its any thoughts and ideas they have in response to a question.
- 2 Collect the Post-its and sort them into themes.
- 3 Split the participants into smaller teams, giving each team one theme to use for inspiration for new ideas.

Why theming works

- ▶ Theming disrupts linear patterns of writing and thought. Reordering the thoughts and ideas encourages you to look for patterns.
- ▶ Theming shows what the most popular idea or thought is, rather like a visual form of voting. So, for example, if one theme has 20 Post-its and the other has 3, the theme with 20 is obviously more relevant to the workshop team and should be a main focus.
- ▶ It ensures that even the most timid members of the workshop have contributed to the thinking, and shows everyone that their thoughts are represented.



Theming

Quick ideas workshop plan (1.5-hour workshop)

Time	Task
09.00	<ul style="list-style-type: none"> ▶ Welcome + objective + reminder of creative behaviours
09.10	<ul style="list-style-type: none"> ▶ Participants introduce themselves with prep task 1 (bring an example of a product, service or experience they have recently had and be prepared to talk about it) ▶ They each write three separate Post-its about why they chose that example and hand these to the workshop leader
09.30	<ul style="list-style-type: none"> ▶ Workshop leader themes the Post-its into groups and splits the team into groups of three ▶ Each group is given one theme from prep task 1 and they use the Post-its within that theme as new angles to give them three new ideas ▶ Each group presents their ideas back
09.50	<ul style="list-style-type: none"> ▶ Workshop leader splits team into pairs, making sure everyone works with someone new ▶ Ask each pair to share with each other prep task 2 (look at their expertise from a new angle), making notes and discussing each other's information ▶ Each pair uses the discussion to create three new ideas inspired by prep task 2 ▶ Each group presents their ideas back
10.10	<ul style="list-style-type: none"> ▶ Workshop leader splits team into new groups of three, making sure everyone works with someone new for this last round ▶ Ask each group to share with each other prep task 3 (bring an example of a trend or cultural phenomenon), making notes and discussing each other's information ▶ Each group uses the discussion to create three new ideas inspired by prep task 3 ▶ Each group presents their ideas back
10.25	<ul style="list-style-type: none"> ▶ Workshop leader reminds the team of the workshop objective and criteria for choosing next steps ▶ Team vote on their favourite ideas/idea themes to develop further ▶ Closing comments from each team member
10.30	▶ Workshop ends

Ask yourself

- ▶ How can we get inspiration from the outside world into this session?
- ▶ What are other people and organisations out there doing, and can this inspire us?
- ▶ Do we know what our customers and consumers are thinking and wanting?
- ▶ Do we have the right experts or fresh thinkers in the workshop to help us have more ideas?
- ▶ How can we learn from the unique and personal perspective of each individual in the room?

14

CHAPTER FOURTEEN

Creating ideas that build on past successes

'It is only in our willingness to persist in the face of fear, judgment and the unknown... that we give opportunity for our creative and innovative ideas to be realized.'

Jonathan Fields

Use for: looking to the past to inspire new ideas

If you are leading a workshop that builds on past successes, be careful to design inspiration that goes beyond what has always been done. People find it easy to shy away from doing something new in case it doesn't work and lean towards doing something that has been done before. New ideas and directions can build on past successes, but people need to have an eye on the future and consider how to maintain that success.

The workshop objective: to inspire ambitious ideas based on past success

One of the biggest temptations in workshops like this is that people look inwards, reflecting only on their own organisation, team or people. With this type of objective, encourage your team to look outside for past successes, at your competitors and at other industries that have succeeded.

People also prefer to look at successes rather than discussing failure, because talking about failure is uncomfortable. As well as defining success and how it comes about, consider failures and what they can teach us.

15 CHAPTER FIFTEEN

Improving existing ideas

Use for: making sure you don't lose the essence of good ideas when you improve them

Ideas build on each other. Every idea is made up of the many ideas that preceded it. If there are ideas that already exist that need improving, be careful not to throw away all the work that has been done to get there. It is easier to create completely new ideas than improve the existing ones, because we tend to want to create our own ideas, instead of improving on the work of others.

The workshop objective: to improve ideas by building on their strengths

When a new set of people look at an idea for the first time, they tend to come at it from a very critical mind set. Because they didn't create it, it is easy to work out what is wrong with it. The risk of this is that they change the idea beyond recognition when they try to improve it.

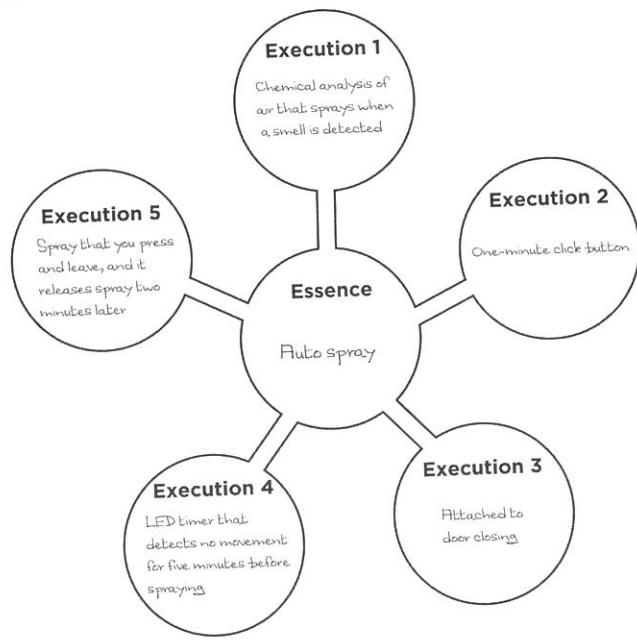
The most important thing to do before you begin to improve existing ideas is to identify the strengths of the idea and the essence of the idea that must not be lost, before working out what needs to be improved. The essence of the idea (the core benefit) is different from the execution of it (how it might be made to deliver that benefit).

The difference between essence and execution

I was doing a workshop on innovating fragrance sprays for the toilet. We had found a product need: that people who use them want to spray after they have been to the toilet, but don't want the spray mist to fall on them. So people were spraying and rushing out of the room quickly before the fragrance settled. This led to an idea for an electric unit inside the toilet with a timer that would spray the toilet after the person left the room.

When we reached the stage of voting on ideas, the technical leader in the team did not want us to include the idea in the list of final ideas to develop, even though it had the most votes. When I asked him why, he said it wasn't feasible because it would mean putting power supplies in toilets and might be dangerous in a bathroom. In my mind, using the electricity supply was just one possible execution of the idea.

The essence of the idea was that the spray was timed for just after the person left the room. Whether the concept used a mechanical timer that went off when the door was closed or a button you pressed before you left the room that delayed the spray for five minutes, there were many possible executions of that idea that would be more feasible and keep the essence of the core benefit.



Essence vs execution

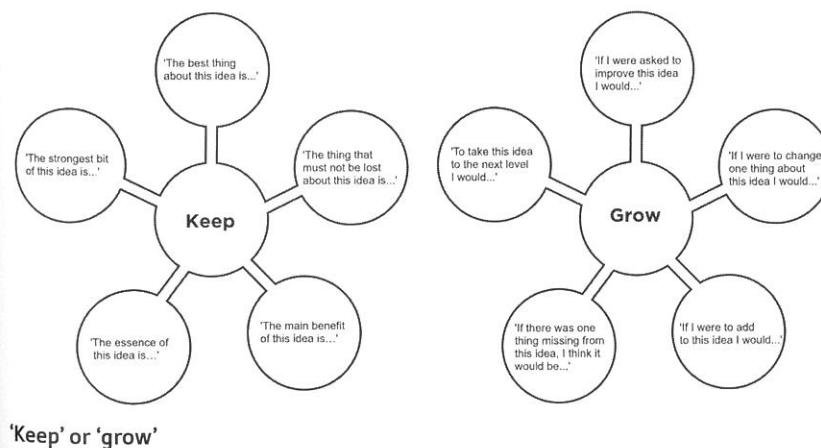
Identifying the essence

One of the most important things that you need to do before you improve ideas is to make sure you identify what the essence of the idea is and therefore what benefits must not be lost when improving it.

Keep or grow tool

This tool helps to identify the essence of an idea as well as to work out what needs to be developed before any work is done to improve the idea.

- 1 Take existing ideas and stick them up around the room.
- 2 Below each idea put up a flipchart which has 'keep' on one side and 'grow' on the other side.
- 3 Ask people to read each idea in turn, writing down as many keep Post-its as they can, using the 'keep' statements to help keep the wording of each point constructive.
- 4 Once all the 'keeps' are written, move onto writing down what can be improved or developed in the 'grow' section, using the wording suggested to keep sentences constructive.
- 5 You can then split the team into groups and ask each group to take one idea, with all the 'keeps' and 'grows', back to their table.
- 6 Ask each group to theme the Post-its under 'keep' and 'grow' and from those themes identify what must be kept (what is the essence and main benefit of the idea), before then identifying how to focus on what to grow (any improvements that need to be made).
- 7 At this point, teams can then begin to work on improving the ideas.



'Keep' or 'grow'

Ideas measure tool

The ideas measure tool can be used to assess ideas, measure their strengths and weaknesses, and identify what to work on to improve them.

- 1 Plot the ideas down the left-hand column of the template.
- 2 Along the top row write in the important criteria that the idea will be measured on, for example fits with brand, meets consumer needs, is innovative, is sustainable, is better than competitors, etc.
- 3 Ask participants to work on each idea in turn, horizontally, using a tick, dash, line or question mark, before moving on to the next idea.
- 4 Once all the ideas are complete, the team have created a visual map of the strengths of each idea and where each idea needs to be improved on.
- 5 Then you can send away the different teams to work on improving the weaknesses of each idea.

	Does it fit the brand?	Does it have consumer need?	Does it give us a competitive advantage?	Is it easy to make?
Toilet sprays and anti-bacterial gel that settles on the seat	✓	✗	✗	✗
Movement sensor so sprays after people leave the room	✓	✓	✓	—
Timer like heating meter you set	✓	✓	✓	—
Linked with door slamming	✓	✓	✓	✓
Warning tone before sprays	✗	✓	✗	✓

Ideas measure tool

Note: instead of ticks and crosses, you could use a traffic light system (green = strong, orange = OK and red = weak) or a three-point system that can be added into overall scores (1 = poor, 2 = average, 3 = good).

Improving ideas workshop plan (4-hour workshop)

Time	Task
09.00	► Welcome + objective + reminder of creative behaviours
09.15	► Present original ideas which they will be working on today
09.30	► Ask each group to use the 'keep' or 'grow' tool ► Groups improve the ideas based on the keep/grow guidelines and present back the improved ideas to the teams
10.15	► Split into teams to define the essence of each idea and the improvements to be made to it
10.45	► Break
11.00	► Do the ideas measure as one big group, working on the recently improved ideas from the previous round
11.45	► Split team into new groups, each taking away one of the ideas to improve using the improvements identified by the ideas measure tool ► Present back improved ideas to team
12.45	► Workshop leader talks about next steps and actions ► Closing comments
13.00	► Workshop ends

Ask yourself

- How can we build on the work that has already been done on these ideas?
- What kind of people will be good to have in this workshop?
- How can you keep the tone constructive and positive?
- What are the main criteria we will use to evaluate these ideas in future?
- Who will we present the improved ideas to, and what do they expect?

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CHAPTER NINETEEN Customer needs workshops

Use for: improving the way we meet customers' needs

When you are leading a workshop to help a team better meet their customers' needs, the first step is to make sure everyone in the team has recently talked to their customer, consumer or end user about the workshop topic. For a charity this would be the charity beneficiaries or donors; for a management group this would be its staff; for brands this is the consumers of the brand. Hearing customers talk is vital, because how they express their needs is a rich form of inspiration. When team members repeat the language of the customers they talked with, they build a strong shared understanding of what customers need across the team, identifying themes that lead to new ideas.

The workshop objective: identifying customer needs to build better ways to meet them

Whether you have lots of market research or none at all, everyone coming to the workshop should have had a recent conversation with their target person on the topic of the workshop objective. It's not enough to have read a research report on the subject; they need to have heard it face to face and in the customer's own language.

If there is already a wealth of research, the conversation with the customer will bring to life those insights for you in a rich and meaningful way. If there is no research available to review, then it is all the more important to talk to customers beforehand.

How to talk to customers

As a workshop leader, you may find it difficult to persuade the team to talk to their customers. People are under time pressure and this might be seen as extra work. You will need to explain why this is necessary and how to go about it. Make sure people understand this is an interesting task that will prepare them for the workshop and may simply be a 15-minute conversation, so it should not feel onerous or challenging. Consider:

- ▶ having customers in the workshop with you
- ▶ finding customers to talk to in advance through friends and family networks
- ▶ talking via phone or video calls if customers are in different places
- ▶ using a professional recruitment company if your customers are hard to find.

What to talk to customers about

Use no more than five carefully worded, open-ended questions covering the following points:

- 1 Who are they? (Ask them about themselves, their family, their work and their general life.)
- 2 How does our organisation/brand/product feature in their life? (Ask how aware they are, when they use it, how important it is to them.)
- 3 What are the most positive aspects of being our customer? (What do we do that's better than the competition, what are the best aspects of the products you buy, what do we do well as a management team for you?)
- 4 What improvements could be made? (How can we improve our service to you, how could we make our product better, how could we do a better job for our customers?)
- 5 What advice would you give us to improve the way we serve customers like you? (How can we improve our offer in the next five years, is there anything we are not doing that we could start doing, do you have any other feedback?)

Make sure that the team are clear that they should write down the customers' answers to the questions word for word. This is because the words and phrases people use in informal conversation offer rich inspiration

A story in three words

A workshop I once ran aimed to create ideas to help older people to feel more confident buying products online. We had many pieces of research to review and the team each visited the homes of several older people who were comfortable going online and several who were not. One of the most resonant quotes we heard was from a woman who wanted to do more online but was worried that she would 'break the internet'. In those three words we were able to understand just how concerned some people could be about doing the wrong thing online.

Theming customer needs

It is crucial to turn the customer interviews into some clearly defined need areas, so that you can deal with each need area in turn when generating ideas.

When the interviews are completed, theme the answers in preparation for the workshop. Print out all the notes from the interviews and cut out each sentence or section, grouping them according to theme. The themes should be based around the customers' needs, not the interview questions.

For example, you might find that one customer mentions the convenience of the packaging in the question about the advantages of this product over a competitor's product, and another customer mentions that they want the packaging to be even more convenient in the question about what we could do to improve our product. Even though the answers are from two different questions, they will both fit within a theme of 'making packaging as convenient as possible'.

Stick all the answers for each theme on one flipchart sheet, so that you have several different posters to put up in the workshop for people to read. Put the name of the theme on each poster and decorate the posters with images and magazine cut-outs that bring each theme to life.

If you have a wealth of research about your customers as well as these interviews, make sure that the posters also include key evidence, statistics or conclusions from past research. I tend to print out the most important conclusion slides from any past work and add them to the posters.

Why create posters?

- ▶ Posters are visually powerful, and having them in hard copy in the room rather than summarised onto PowerPoint slides means that they can be visible from the start, and throughout, for people to be inspired by.
- ▶ Instead of summarising the interview themes in my own words, I deliberately keep the actual words and phrases that the team sent in, so that all the different language can be read on each poster. This keeps the rich first-hand tone of the customers' voices, and it also helps the team to feel included because they can read their own interview quotes and see how they relate to the overall themes.
- ▶ Sometimes people send in handwritten notes, or use different fonts, levels of detail and even photos. These all provide visual richness and variety, which means the posters themselves are interesting to read and you may discover nuggets that lead to ideas.
- ▶ Posters are a much more powerful way of helping bring to life customer needs and make them memorable for the team beyond the workshop (you can even have them laminated and keep them as a reminder during future work).

Finding the meaning within the themes

Research has shown that people will be far more committed to a conclusion if they feel they discovered it themselves rather than hearing it from someone else.¹ After forming and naming the themes, a great way to get the team owning and believing in the customer needs is to hand over the interpretation of those themes to the team.

How to create meaning in teams

- ▶ Split the team into small groups and ask each to work on one or two of the themes. You can either ask each team to choose which themes they'd like to work on, or assign them yourself, having carefully considered who will work together best on which theme. For example, I sometimes ask the most pessimistic person on the team to join the group that is working on a theme full of product benefits or advantages. Likewise, I select the most positive person to join the group who will discuss a challenging theme or area of weakness.

- ▶ Send each group away to read all the different quotes within that theme, and ask them to come back having summarised the main needs and opportunities that come from it.
- ▶ To make sure teams come back with comparable work, give them a template or structure to follow, for example come back with the top three insights and the top three opportunities this theme inspires.
- ▶ Teams present these back to each other and so the analysis and implications have been shared across the teams. In debating and discussing them they have even greater familiarity with the customer themselves.

Workshop to better meet customers' needs (4-hour workshop)

Time	Task
09.00	<ul style="list-style-type: none"> ▶ Welcome + objective + reminder of creative behaviours
09.10	<ul style="list-style-type: none"> ▶ Participants introduce themselves and briefly mention who they interviewed as a prep task and any immediate insights they got from that interview
09.30	<ul style="list-style-type: none"> ▶ Workshop leader presents the themed posters that outline the main needs emerging from the interviews ▶ Split the team into groups of three and ask them each to choose one or two posters to work on (depending on how many posters there are and how many teams you have) ▶ Each group is given an instruction and template to analyse the posters to identify the top three insights and the top three opportunities within that theme ▶ Each group presents their ideas back and sticks the insights and opportunities templates on the wall next to the relevant poster
10.30	<ul style="list-style-type: none"> ▶ Break
10.45	<ul style="list-style-type: none"> ▶ Workshop leader splits team into new groups of three, making sure everyone works with someone new ▶ Ask each group to choose one theme (poster and insights + opportunities template) ▶ Each group uses the poster and template to create 10 new ideas for how to meet that particular need ▶ Each group presents their ideas back
11.00	<ul style="list-style-type: none"> ▶ Workshop leader splits team into new groups of three, making sure everyone works with someone new for this last round ▶ Give each group an idea stretcher template and ask them to write down their top four ideas from the last round in the left-hand column. Then fill in the completely mad and finally innovative and ambitious versions of that idea ▶ Each group uses the completed template as inspiration to create three new ideas (or improvements on existing ideas) for meeting customers' needs ▶ Each group presents their ideas back

Time	Task
11.45	<ul style="list-style-type: none"> ▶ Workshop leader reminds the team of the workshop objective and criteria for choosing next steps ▶ Team vote on their favourite ideas for meeting customers' needs better, to develop further
12.00	<ul style="list-style-type: none"> ▶ Workshop leader splits the team into new groups of three, with each group taking one of the best ideas to develop into actions and next steps ▶ Teams present back their developed ideas and action plans ▶ Closing comments from each team member
13.00	▶ Workshop ends

Ask yourself

- ▶ How will we help everyone to talk to their customer?
- ▶ What insight would we like the participants to gain from speaking to their customers?
- ▶ How will we identify the main customer needs?
- ▶ How will we create ideas from the most important needs?

20 CHAPTER TWENTY

Roadmaps

Use for: understanding why and how to create a five-year roadmap

A roadmap is a detailed plan that helps the team anticipate the future, usually within a defined time period of at least five years. The roadmap shows a set of ideas and how those ideas build from the present towards the future. It helps to define how to get from now to the future, and to time initiatives and actions to make sure you have started early enough to make ideas happen at the right time.

The workshop objective: to create a set of ideas that stretches into the longer term

There are various reasons why you might choose to lead a roadmap workshop, for example:

- ▶ to create an ambitious mid- to long-term plan to maximise an opportunity for business, market, technology or consumer change
- ▶ to look five years into the future to establish a far more ambitious short- and medium-term plan
- ▶ to release a team from worrying about the here and now by inspiring them with trends and opportunities, and allowing them to optimistically construct the future.