Creating and Facilitating Great Workshops

By Mary Kate Scott

Creative workshops are a key element of many projects – how can you ensure success? You know the basics of great workshops; what are the secrets to a high impact workshop?

Fast review: A typical innovation workshop consists of:

- **Use a warm-up activity to get people relaxed and creative.** Start by getting people relaxed and comfortable with each other using a quick creative challenge or quirky introductions. This is vital—many studies demonstrate the importance of being in a relaxed state, and it's recognized that anxieties and tensions prevent people from making the kinds of creative leaps and improvisational thinking required to make creative workshops successful. Having everyone in the right frame of mind is critical to the success of the day's activities.

One of our favorite warm-ups is the use of optical illusions such as the drawing of the old woman/young woman. Ask the group: do you see an old woman or a young woman – or both? For those who only see one of the women, ask if they believe that their colleague can see the other woman—typically people can believe their colleague can see something else. Translate this to the workshop or to daily work. Often we can only see one side of an issue. Can you encourage the group to believe a colleague when they see it differently, even if they can't see the image/idea themselves? This is a fast and fun warm-up.

- **Clearly state the objectives of the day.** It's critical that everyone understand the context of the creative activities that will follow. Set an aspirational tone but also ensure that the group is grounded in what they need to achieve collectively by the end of the day. This might include a specific number of new ideas to drive sales, or a new product, or a commitment to a new way of working, or even a willingness to learn and share a new idea.

- **Frame the problem to be solved.** If participants are to stay on track, it's important to draw some hard boundaries within which everyone is encouraged to play. Think of this as building a fence around the playground. In my experience, the tighter this fence, the more likely you are to see useful ideas at the end of the day. Every constraining detail is a potential trigger for a brilliant idea, so be sure the brief is focused and specific.

Great questions lead to great solutions

- **Divide people into smaller teams to solve the challenge.** This encourages participation and ensures that there will be multiple different ideas presented at the end of the day. Ensure flow between the larger group and smaller groups. Consider if you want to keep smaller groups together throughout a workshop or shift the groups. Consistency in groups allows the team

to refine their ideas, while diversity in groups can allow for more ideas.

The first 4 parts are straightforward… here is how to drive impact.

- **Idea generation activities.** This is where the bulk of time is typically spent. Usually, 2 to 3 activities are spread throughout the day. While the types of activities vary with every workshop, the goals are the same: to force participants to look at the problem/opportunity in different ways.

Great questions lead to great solutions
Here are ways to ask great questions:
  - Role-play a specific brand or person or company ("How would Mark Zuckerberg, Steve Jobs, Martha Stewart, or Jack Welch solve this problem? What would a solution from McDonalds, Walmart, Avon or Starbucks incorporate?" "What would the solution look like if it were a product from Google, Toyota, BMW, IKEA, or H&M?")

Role-play a specific brand or person or company… tip: move away from your industry for insights

  Tip – move away from your own industry for insights from brands or companies but make sure that your thought starters are generationally appropriate.
  - Reverse the problem ("How might we encourage people to litter, gain weight, start smoking?").

Reverse the problem

  - Force connections between unrelated things ("How is our idea like 'Angry Birds'?") Make sure you bring out the positive and negatives aspects of how ideas are like these unrelated things.
  - How can we make our solution/idea/product more childlike and playful? How can it be more fun for the user?
  - How can we make it faster? (And is faster better?) Who uses our product slowly? Who uses it quickly?

What would an app for solving our problem look like?

What happens right before or right after your product is used?

  - What would an app for solving our problem look like?
  - Understand the sequence of using your product—what happens right before or right after your product is used? What is frustrating or annoying or disappointing?

Dryer sheets, for example, work—they reduce static, make clothes soft, and smell nice—but you're left with annoying sheets to be thrown away after use. Ask the group for ideas on how to can remove the adjacent annoyances. With dryer fabric softener, Bounce put their product into a solid form that sticks in the dryer; you don't have to remember to put the sheet in and there's no annoying sheet to throw away.

The book *Gamestorming* is a helpful collection of 80 of these kinds of activities.

Focus Capture the best 10+ ideas on sticky notes. Quickly prioritize the best 3 to 5 (or so) ideas and pick several favorites. Ask the whole group to plot ideas on several charts; one chart could have an axis for "easier" vs one for

"highest impact"; another chart could have "most creative idea" on one axis and "least expensive" on the other. Look across the charts and see which ideas are in the top right of the various charts (i.e., both easy and high impact or most creative and least expensive). Ask the group which ideas they like the most (thinking with their hearts) and which could be most easily implemented (thinking with their rational brains).

Frame the problem from an experience perspective; you see an entirely different set of opportunities,

Keep sight of the customer experience

Many of the success stories of the last decade (e.g., TiVo, Basecamp, the Flip) suggests that breakthrough products have succeeded by focusing on *how* they allow people to do something in a way that is easier and much more delightful. There were MP3 players before the iPod, but it took someone focused on the basic experience of music enjoyment to see opportunities to create a better player (and the ecosystem needed to support that experience). Most innovation workshop activities stop at meaningless *what* statements like "easiest to use" or "simple." But what about the *how*? How are you going to

Your workshop is about creating a road map of strategic priorities for the team. Still consider the tip around "customer experience." As you're prioritizing what the team needs to do (e.g., to become the leader in category X), create sets of activities for salespeople or operations or product development that connect. Ask the team: "What suite of solutions will work together for us to achieve success?"

put those ideas in action? Focus on *how* we create delightful experiences for customers or sales people.

When you reframe the problem from an experience perspective, you see an entirely different set of opportunities, often extending well beyond a single product.

In innovation workshops, in the rush to invent some new thing participants can lose sight of the context in which a product or service is used. Consider and prioritize feature sets, not discrete features, by asking participants to evaluate feature sets (vs a single feature. Substitute "features" with "ingredients" and you'll see the challenge. We could try and estimate the value of separate ingredients (flour, eggs, vanilla, chocolate chips, butter, etc.) and discuss the different ways to combine these ingredients into recipes. Often, the value of some features can only be understood in the context of their combination with other features. If your company only has enough money to invest in three major features, you'll need to think about the coherent experience you're promising, not a list of specific features.

Consider the Fitbit. From a what perspective, it's a $99 pedometer. Who would pay for that? But Fitbit gives you more than just a piece of hardware. The Fitbit has rethought the classic pedometer, focusing instead on the experience of monitoring daily physical activity. The result of their efforts is that the Fitbit is an elegant data collection device that syncs wirelessly with your computer; most of the interactions happen through a simple and attractive web interface that allows users to monitor calories burned, steps taken, sleep patterns, and other information gathered from a few basic data points. The system also links users to a larger community.

Refine. Ask groups to refine these ideas. Let groups form around the favorite ideas. Make sure you refine ideas before creating implementation plans. As you work on refining ideas, consider combining two or more that could be implemented together. Think about ecosystems—what can you surround the idea with to make it better?

Bring back refined ideas and vote on the best.

Commit to a set of next steps. It's tempting at the end of a long day to walk away. Resist this temptation and ensure that there is real time to

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determine how to take these ideas forward. Create immediate traction and a simple mechanism for transparency on this traction.

That's the process of a workshop – here are 7 simple ideas to make it work.

7 ideas for great workshop flow

Most workshop missteps are a result of not paying attention to the details, which can lead to missed opportunities or digression into smaller ideas. Some of these missteps are tactical, some are strategic. Here are a few quick tips.

#2: Use Illustrators (graphic facilitators) to expand thinking and gain commitment

Many people need to be able to visualize an idea. Graphic facilitators can document new ideas, company roadmaps or strategic plans, and other concepts developed in the workshop.

Sometimes you'll end up with someone who can sketch, but be careful: The most popular ideas are often the best-illustrated ones, but that doesn't make them the best ideas. A little secret: the person who sketches is the one who frames the problem, something important to remember during the ideation and refinement processes. I've seen great ideas get ignored in favor of others that were more powerfully communicated through visuals. The best pitches—the ones that rely on illustrations, storytelling, and theatricality—will often win hearts and minds.

Having a neutral graphic facilitator working alongside the group facilitator ensures that all ideas are represented. And with visuals, it's also much easier to review ideas after the workshop.

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#3: Allow (some) room to go off the trail

Have you ever been really excited by a conversation, only to have it cut off because it was "off topic"? As teams start to stray from the agenda or the stated goals of the activity, it's frequently useful to steer them back on track, but not always. It's not uncommon to have an exercise backfire or have groups deviate from the intended outcomes of that activity, but being overly attached to the planned agenda is a sign of a less experienced facilitator. Experienced facilitators keep their eye on the broader goals of the day and have the experience to improvise, change course, abandon a planned activity, or embrace serendipitous moments that can make or break an innovation workshop.

#4: Be willing to delve into the details, so you don't leave with unrealistic ideas

While it's good to open the door to wild ideas and there's an argument to be made for removing the naysayers from a workshop, it's equally valuable to have realistic perspectives in the room. Make sure the truly unmovable details are clearly documented. Brilliant people can come up with flawed ideas, all because of missing information.

Also, make certain your small groups are representative of different areas of expertise. Have people focused on the customer, business, and technical needs (and, in some cases, the legal or regulatory factors). When deciding whom to invite, choose people based on their flexible thinking skills, not on their role within the organization.

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#5: Provide time beforehand for people to research and prepare.

Good participants will respond to stimulating information. Provide information at least a week in advance of the workshop so everyone has an opportunity to conduct their own independent research. This will result in better, more focused input at the onset. Ask people to come with ideas ready to share**.** While many of these ideas will be based on misinformation or misunderstandings, having more "pieces" to throw into the mix is rarely a problem.

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#6: Allow 2 days for the workshop.

One day has never provided enough time to get the optimum results. Yes, adding a second day adds to bottom-line costs. However, given what's already invested to get everyone together, I believe this additional time is critical for giving good ideas the time they need to fully bake. Too many workshops end the day with a bunch of half-baked ideas, and frequently, ideas are refined as we sleep. A second day

allows you to pick up those early ideas and fully develop them.

#7: Create opportunities for honest feedback on the process and results.

Resist asking, "So, how do you think it went?" at the end of a long day. People don't say what they're honestly thinking in front of groups of other people; they share later, during one-on-one conversations. Find ways to elicit this honest feedback from everyone involved, perhaps by soliciting anonymous feedback or creating 1-1 opportunities, making it easy to provide critique.

Find ways to elicit honest feedback from everyone.

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