Not Just Another MEETING
CREATIVE STRATEGIES FOR FACILITATION
RODNEY NAPIER AND ELI SHARP
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INTRODUCTION

After decades as consultants, teachers, and facilitators, we continue to see the need to provide leaders with tools, skills, and strategies for building more effective teams and organizations. Twenty years ago, Rod wrote the first of four books dedicated to translating strategic “designs” into a language accessible to leaders, managers, and particularly facilitators. These simple yet in-depth solution models were designed to help solve a problem, resolve a conflict, make a decision, or address anything else that might block the team, meeting, or organization from reaching a goal.

It should have been a no-brainer: proven ways to improve either team or meeting effectiveness, almost as easy as painting by numbers. However, it took years to discover a certain fallacy in this thinking: Leaders and facilitators would not even attempt our easy step-by-step approach if they had not had the opportunity to experience it firsthand. They had to see the strategic designs being implemented successfully before they would risk trying virtually any of them. The potential for failure or loss of face in front of their direct reports or, heaven forbid, their boss or client would never occur. Rather than chance success, they chose to continue with mediocrity. The keys to victory lay on the table, yet the risk-adverse leader or facilitator would not pick them up.

Suddenly we were faced with huge evidence of the need for a new and innovative way to teach facilitators—and through them, leaders—how to improve their team and meeting effectiveness. So during the latter part of this book, after some brief foundational work, we will bring the experience—the demonstration of our ideas—to you. Learning some accessible new skills should prove to be both
interesting and enjoyable as you expand your facilitator repertoire. It will be like shining a new light on situations you’ve taken for granted for many years; suddenly, you’ll have new choices to excite you and your stakeholders. Our job is to make the facilitation process both interesting and fun—yes, fun.

The Extraordinary Dollar Cost of Mediocrity

Over the years, we have conducted several analyses of meeting costs for large businesses that have implications for anyone who has ever attended a less-than-satisfactory meeting. Each time, our rather conservative estimates proved to be mind boggling.

For example, the average executive spends at least 10 hours a week in meetings with an average of five people at each meeting. Each of those individuals would be priced out at no less than $100 an hour, which adds up to $5,000 a week in meeting costs. For larger companies, multiply that $5,000 times 50 weeks, then times the 50 top executives, and the cost is more than $12 million. Yet, of all these executives, only 10 percent said they’d received training in anything more than how to build a meeting agenda. One organization we studied had 300 facilitators at an executive level, and many of the meetings had well over 10 people involved. The associated cost ballooned to more than $100 million a year, with few of the meetings being evaluated, and rarely were the facilitators provided any feedback.

Even more challenging is the admission by a majority of these facilitators that they spend no more than 15 minutes preparing, such as by creating an agenda, for the average one- or two-hour meeting. The reason? They have a limited repertoire of strategies for such meetings other than PowerPoint presentations, or habitually defined approaches that make every meeting seem just like the last one: predictably boring. If you’re smiling or grimacing, join the thousands who would agree.

The need, we discovered, is a foundational one—the strategic development of trust and creativity across teams and organizations, through not only design but also the trusted facilitators upon whom organizational leaders depend. Without this strategic development, there are few high-performing teams or truly successful meetings. “Same old, same old” rules, and productivity and innovation suffer with little being done to alter the equation.

For 30 years, we have presented our consulting clients with strategies to facilitate differently, and now we are bringing these tools and skills to you with a new approach that enables you to witness our strategies as if you are in the room. Anyone who reads these pages and studies the accompanying animations will expand their
repertoire of facilitation solutions. They’ll gain a new understanding of how to work effectively with highly diverse groups of individuals, begin to think diagnostically, and enhance their creativity as facilitators in support of moving teams, meetings, conferences, and gatherings of all kinds to new levels of effectiveness. And the benefits will continue to increase as they become more comfortable with these ways of thinking and acting.

**Different Uses of Facilitation**

During the past decade, the number of different roles and functions in organizations of all kinds has diminished dramatically, partly because of the economic collapse. The result is an emphasis on the bottom line, staff reductions, and the persistent theme of doing more with less. All three factors have conspired to raise levels of fear and urgency in a crisis-reactive work climate. “Just do it, damn it!” is increasingly the leadership mantra.

Command and control management has returned with a vengeance. More and more leaders have adopted a militaristic, “take the hill” approach. The last thing they want is to be questioned. Community-enhancing behaviors like engagement, collaboration, and open communication, while often discussed, have been shelved because they require precious time both to build the necessary skills and to execute. And there is the lingering fear that working in groups itself requires more time. It is confusing when people still use the words—the cooperative jargon—while doing the opposite. Simply getting people into a room with a demanding topic that shouts out for collaboration and deep discussion will not have a good result, no matter what the boss says. More often than not, the goal of the participants is to finish as soon as possible with a minimum of boredom or pain. A bit cynical, but often true.

Further, leaders are often lulled into believing that facilitation is a simplistic process of formulaic strategies. There are innumerable books pushing their wares on harassed managers, leaders, and their erstwhile facilitators. The “quick and dirty” prescriptive advice promises easy success if basic rules are followed. The 60-Second Leader, or 6 Tips to Success, or Eight Lessons From Genghis Kahn prey on the confusion in leadership today, while also placing greater emphasis on the marketing potential of a concept over its actual content.

Our view is that leadership and facilitation have never demanded so much or been under such challenging conditions. At the same time, never has there been such an array of tools and skills available to improve leadership effectiveness. And
facilitators are in the crosshairs of that reality. It is for them to make a silk purse out of a sow’s ear. Their leaders tell them what to do and what they expect, but they haven’t a clue how to deal with the contradictions and demands thrown at them.

For example, we observed a two-hour meeting with nine executives who were to identify obstacles to their organization’s operational efficiency. The meeting facilitator had each of the leaders write down their three greatest priorities and then opened the floor for discussion, dutifully going around the circle of leaders so each would feel involved. Of course, all hell broke loose as the executives argued for the issues that would cause the least disruption to their part of the organization. At the end of two hours, confusion reigned and little knowledge had been transferred, nor was there a commitment to further action.

In our debrief with the frustrated boss and facilitator, we suggested an alternative design that had each of the nine leaders go into one of the areas other than their own and interview 10 floor leaders about what they believed were the greatest operational deficiencies in the organization (not only in their area). The interviewing executive would return with critical issues that blocked organizational efficiencies and that the floor leaders thought needed to be addressed. Then, working in clusters of three, the leaders would identify the five most salient issues drawn from their three groups. Finally, the three groups would come together, making it relatively easy to identify the most critical issues as well as a few salient additional areas that caught their interest.

The design was diagnostic in nature, and it reduced the inherent competitiveness that had corrupted the initial meeting and reinforced the silos that had plagued the organization for years. The facilitator was used to going around the group to ensure that everyone had an opportunity to speak, but the same few leaders tended to dominate every meeting. Thus, the design used at the following session mitigated several deficiencies in the team’s working process.

The leader of the executive team hadn’t understood the value of the executives listening to the floor leaders, nor the value of the executives working for the good of the whole rather than their own interests. The interview design prepared leadership for eventually doing the heavy lifting necessary to solve the problems the floor leaders raised. Then, even better, the facilitator could engage some of these floor leaders in the problem-solving process. And that, in turn, would increase the probability that solutions would be owned by the floor leaders responsible for enacting them.

For the facilitator, improvement of such a dire situation begins with an
awareness of your limitations. So, before digging into the opportunities found in the art of design, it is critical for any facilitator to know how they will affect the group. This means developing the philosophy of “intentional facilitation,” the principles of which we’ll be exploring. So, in this book, we promise to:

• Provide you with a greater awareness of your impact in your critical facilitation role.
• Add greater rigor and discipline to your role as a facilitator.
• Offer a new way of thinking about the teams and meetings for which you are responsible. We’ll also show how even a little additional time designing can enhance the productivity of a group and the individuals who comprise it.

The Purpose of Intentional Facilitation

The role of facilitators in the organizational leadership equation has two equally important sides. The first is being conscious of your own behavioral impact versus your intention. The second is extending your repertoire of what to do and how to do it so that you can respond strategically to any situation with calm, certainty, and creativity. This will forge the necessary trust between you and your leaders. They have handed you the reins for dealing with the widely differing challenges they face every day. As you become more skilled, so will they in their demands and expectations as well as their knowledge of what is possible in any given meeting.

This ability to respond with calm certainty is where the art of design becomes important.

An effective design is not, as you will see, some magical formula. It is a learned set of skills that can change your way of being a facilitator and a leader. Put simply, it demands that you are willing to be both a learner and an experimenter.

As a way of thinking, it’s fairly easy to understand. It’s based on the belief that virtually every situation demands something to move the team, group, or meeting forward in a positive manner so that those involved feel productive, and, hopefully, well utilized. Now, how many people leave meetings feeling successful, productive, and well utilized? In observing and evaluating meetings for nearly five decades, we’ve found that the answer is usually very few.

And yet, people do not intentionally create mediocre, boring, unproductive meetings or cultivate combative or passive members of their organization. The truth is that most people facilitating these meetings simply do not ask the right questions as part of the diagnostic narrative we will explore. Nor do they choose the
designed activity that will best work for the group. After all, few of their colleagues model what we are suggesting. But our demonstration, through the use of avatars, of the successful designs that could strengthen their limited repertoires can help fill the gap experienced in most organizations.

Successful facilitation is one critical aspect of leadership, just like hiring, creating a compelling vision, or goal setting. It’s one way of thinking about yourself in relation to those you lead—it’s not as if you can turn off your leadership self at any given time. Intentionality is at the core of successful facilitation. It implies that everything you do is under scrutiny—by yourself and others—and makes a difference in how easily people accept your efforts to lead them through a particular designed activity. Living that simple definition can immediately improve your facilitation effectiveness. It requires no expensive books or seminars, no training program. It demands only a new rigor, a new discipline in how you see yourself and what you do as a facilitator at any moment.

It’s like the story of the young father who came to Rod after they’d been working together for a while and asked, “Rod, I have a personal question. My eight-year-old son seems to be afraid of me, gets emotional easily, and feels increasingly distant.”

Rod’s response, cutting to the chase, was, “Well, what do you do when you’re angry with him? After all, you are 6’2” and weigh around 200 pounds.”

He paused, as if trying to remember, and said, “We have a good relationship. In fact, I rarely get angry and I can only remember one time when I really lost it. He was five years old and did something stupid and I remember getting in his face and screaming at him. He ended up running out of the room.” He added, “I can’t imagine he’s still carrying that around.”

Rod reminded him that at that time, his son weighed, perhaps, 50 pounds, and after watching his seriously angry father fly off the handle, he would never want to see him get that angry again. He added, “Consequently, he has become watchful and cautious and a bit fearful whenever he sees you get red—which you do—and when that telltale vein in your neck starts to pound—which it does—he vacates the premises, emotionally, physically, or both.”

Just like the father, most facilitators or bosses become unconscious of their impact and of the signals they emit that say “watch out” or “danger” to others. Other employees, direct reports, or even peers become cautious, especially when they’re stressed, and, predictably, defensive. Under duress, pressed, and sometimes unsure of themselves, people become impatient or angry, or perhaps don’t feel
understood. And, of course, all those little and not-so-little indiscretions are then noted by the individuals who are increasingly fearful of pissing the person off, or potentially losing their jobs. Such caution and fear are cumulative and, over time, can negatively alter a facilitator’s effectiveness. And you or other facilitators will likely never be told about your impact. How different is that from the dynamic between the father and his son? He hadn’t a clue and he loved his son dearly.

To be a facilitator today is like walking in a minefield, cautious of what you say and how you say it. But, by choosing to be the facilitator, it is your job to be intentional. What could I do differently to improve the situation the next time? This becomes your mantra. And, there will be a next time—count on it.

Yes, you can be angry and tell people how you feel. And yes, you can still be spontaneous. Nonetheless, who is to blame for the consequences of your actions? Only yourself, if you believe this way of thinking. That is the challenge. In the complex roles of today’s facilitators, these questions are key: What is your goal in the moment? What is the desired impact for those you lead or facilitate? How do you want people to feel when they leave your presence? Are you up to the level of effort this demands—becoming conscious of both your impact and your intentions? For many, this is a big order, but an essential one to be the most effective facilitator possible.

**Doing Something New as a Facilitator**

There are books on fearless facilitation, on facilitating to lead, and on ways of making it easier. Most talk about the what of facilitation more than the how, and few provide the tools to take you to the next level in your practice. Ours is devoted to the how of facilitation.

In doing so, this book offers leaders 13 classic design modules used effectively by our organization over and over for decades. Each is described in this book, and accompanied by a corresponding animated video (which you can find at www.TD.org/NotJustAnotherMeeting) to visually model the design for facilitators and team members. We believe that seeing leads to doing.

We encourage facilitators to read about the modules, watch the videos, and take notes. With these in hand, the intentional facilitator comes to the conference room ready to inspire increased productivity and creativity within the team and, over time, across the organization.

Following is a table with brief descriptions of the 13 designs. They are provided here to whet your appetite, before their full description (and accompanying illustrations) toward the end of the book.
Solving Problems and Setting Priorities

<table>
<thead>
<tr>
<th>Technique</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Future Search</td>
<td>Each person interviews a group in a method similar to speed dating, with critical findings presented to the whole group in memorable ways.</td>
</tr>
<tr>
<td>The Carousel</td>
<td>Small groups rotate through four to six work centers until everyone has responded. Then, the data from each work center are summarized and shared with the larger community.</td>
</tr>
<tr>
<td>Collapsing Consensus</td>
<td>Small groups list all the factors causing a problem or ways of solving an issue. Then they join forces with another group with the same problem and negotiate the best solutions (or issues) from the two different group efforts.</td>
</tr>
<tr>
<td>Executives and the Common Person</td>
<td>Creates an interview process where deep listening on the part of the leaders provides important information about their team and builds greater trust among those interviewed.</td>
</tr>
<tr>
<td>6-Step Problem Solving</td>
<td>This is a stepwise tool for solving problems collaboratively. This problem-solving design is both efficient and interesting, and has wide-ranging applications.</td>
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Building Trust and Engagement

<table>
<thead>
<tr>
<th>Technique</th>
<th>Description</th>
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<tbody>
<tr>
<td>Kings, Queens, and Fairy Tales</td>
<td>By having small groups describe the current reality in the language of Arthurian times, candor and openness are enhanced with doses of needed humor.</td>
</tr>
<tr>
<td>Genie in the Bottle</td>
<td>Provides a unique, productive means of teaching and practicing feedback skills.</td>
</tr>
<tr>
<td>The 7 in 7</td>
<td>People are asked to share the seven most powerful influences in their lives that have helped make them who they are. This design can have a profoundly positive impact on the trust in a group or team.</td>
</tr>
<tr>
<td>The News Conference</td>
<td>Provides a means of overcoming the natural fear many team members have of speaking truth to power. With the leaders also responding to the truth they hear, this can result in positive results at all levels.</td>
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Dealing With Conflict

<table>
<thead>
<tr>
<th>Technique</th>
<th>Description</th>
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<tbody>
<tr>
<td>The 8 and 6</td>
<td>This is used primarily with two members of a team in conflict. It develops a climate where risk taking is shared and relatively equal, resulting in insights for the two parties.</td>
</tr>
<tr>
<td>Paradox</td>
<td>Provides participants with new ways of considering conflict, especially when it deals with difficult people. It looks at how the problem solver can unintentionally become the perpetrator.</td>
</tr>
<tr>
<td>Questions, Only Questions</td>
<td>Can help move a “stuck” team, group, or committee forward by resolving what ails them in real time.</td>
</tr>
<tr>
<td>Speak Out</td>
<td>Legitimates strong feelings (such as issues around race, ethnicity, or gender) through deep listening, with a goal of understanding differences rather than striving for specific answers.</td>
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</table>

Understanding the why and how of each design results in confidence that can be felt by those being led. It’s like the satisfaction gained when the last pieces of a complex puzzle fall into place. In the process, you as the facilitator will begin to feel
more confident in creating your own designs based on the needs confronting you. By accurately assessing the need of the group in the moment and understanding design, you will find choices materializing almost instantly. Seeing a design as a creative act opens possibilities that may never have been considered. Witnessing the design unfold before your eyes transforms this learning process from one of telling you about facilitation to the exploration of new possibilities that will stimulate both you and those you facilitate.

The marriage of intentional facilitation and design should, at this point, be easy to understand. It is the specificity of intention, based on an incisive diagnosis, that drives design. It is for us to put the necessary meat on the bone of that principle that, in turn, provides the lessons of this book.

Most facilitators run their meetings and efforts to engage groups on the fumes of old habits and routines that have lost their meaning and zest. They reflect the remnants of boring teaching translated into boring meetings. Who, for example, has not gone to a weekly meeting that is completely predictable in how it begins, how it ends, how any discussion is conducted, and who talks and who doesn’t, along with the knowledge that there won’t be sufficient time to complete the agenda? Equally predictable is that those participating in the meeting will leave frustrated at best and angry at worst. To compound the problem, the facilitator, predictably, will virtually never seek or receive feedback about the perceived waste of time many people feel. It reminds me of those who have sat through a horrendously boring sermon in church and proceed to congratulate the minister on their way out on the wonderful service. The same thing often happens to meeting participants who survive a similar experience and then commend the boss or the facilitator for a job well done. One thing’s for certain: When we talk about engagement and a stimulating meeting, we will rarely find the answer in a presentation slide deck.

As a result, the first few chapters of this book will equip you with a new way of thinking and acting intentionally when facilitating meetings and working with teams. The second half of the book provides the following:

- It introduces you to 13 creative designs, using animation to demonstrate how to successfully implement the strategies.
- It allows you to experience each design on a visceral level in a risk-free environment, which will increase your confidence and motivation to use the new approach.
- It reminds you how adult learners learn, so you can enhance engagement and encourage them in your efforts to create your own inventive designs.
By using new animated technology to illustrate these designs, along with new communication strategies, we hope to spread the word among those inspired to bring creativity to their workplace and to groups of all kinds.

We expect to help all our readers bring interest, creativity, and effective outcomes to the workplace. To this end, the concepts of personal impact, intention, and design are highly correlated. The good news is that it begins with your willingness to break some old, habitual ways of acting. This book will help you expand your own possibilities every time you are faced with a group, team, or individual that demands something more than same old, same old and, as a result, will bring out the best in you. If you truly understand and use these concepts, you will never be boringly predictable or run out of possibilities.
ACKNOWLEDGMENTS

I want to thank Amma, Laura, and Tori—my three beautiful daughters—for the extraordinary support I have felt over these many years. They’ve given me loving space to do my work, sometimes at their expense. I hope they have felt my sincere efforts to live the values and skills about which I have written.

—Rodney Napier

To my love, Vincent. Thank you for your never-ending support and true partnership on our journey together.

—Eli Sharp
The first section of this book introduces the concepts of intervention, intentionality, and meeting design both in facilitation and in everyday life. It will help you organize your thoughts with respect to what you actually want from your team, how you want them to feel during your initiative, and where they are starting from.

There are a series of diagnostic questions to help you assess the current situation, and another to help you understand your facilitation behaviors. The concepts are introduced with stories from our experiences that will give you a solid grasp of how facilitation works both in real time and over time. We assume you are starting from the beginning, and ours will be a developmental approach to the notion of design.
For 35 years, we conducted a leadership development program in the wilds of Ontario, Canada, on Lake Temagami. People would fly in on a bush plane and stay between 10 and 15 days to learn how to be more effective leaders and facilitators as they attempted to create a high-performing community. The 16-20 participants took pseudonyms and shared none of their back-home realities, such as the nature of their work role, authority, or background. In addition, we used many Native American rituals to encourage participants to step out of their habitual and predictable back-home cultures and ways. For example, participants spent hours sitting alone in deep woods, listening to and observing the transition between day and night. There were team-based problems to solve and decisions to make that demonstrated how individuals coped with time-driven stress. Participation in Native American sweat lodges tested their courage and ability to be vulnerable. And community meetings provided the stage on which individuals shared some of their challenges—how they were stuck or needed to be different when they returned home. Thus, risking became the norm, with more curiosity and openness expected with each new day and experience.

As the program unfolded, the growing trust among team members allowed them to try on new behaviors and eventually receive critical feedback. The participants hailed from a wide range of white- and blue-collar professions, including physicians, teachers, business executives, managers, therapists, electricians, and
carpenters. People came expecting to be challenged physically, emotionally, and spiritually, with many concerned about the “Who am I now?” question that people need to ask periodically throughout their lives, but seldom have the time to do in our 24/7 world. The sweat lodges, vision quests, and other designs created an environment as challenging as it was inspiring.

By the end of the first week, after sharing some powerful experiences, participants fell into the expected pattern of emphasizing victories and minimizing discord, quickly bonding into a seemingly tight-knit community in what many would call the honeymoon phase of the group’s development. As leaders, it was our role to introduce an event or experience that would compel the community to deal with real conflict, much of which, if you knew where to look for it, simmered under the surface. Being averse to conflict had become the norm, as it often does in many business communities. For example, normally, several cliques would have emerged in such a temporal community, and some individuals would feel left out, or personality issues among the participants would be magnified as differences in power and authority within the developing community.

But politeness continued to rule, and being authentic often took a back seat to members wanting to appear both open and together. When the desire to be “members” begins to trump honesty, mistrust begins to creep into the group just as it does in an office, club, or even church community. The result is that conversations can become contrived and superficial as unspoken feelings and issues are not dealt with. In a community that outwardly prided itself for creating trust, spontaneity, and authenticity, caution, doubt, and suspicion were evolving—none of which result in a climate where deep personal learning is really valued. And that was the reason most said they came to this wilderness setting in the first place. Put bluntly, hypocrisy and insincerity were on the rise.

With this in mind, during the sixth afternoon at lunch, we asked how many vegetarians there were who would not eat chicken. We asked early because the group would be involved in intense activities leading up to dinner, and the leaders were responsible for meeting the dietary needs of the group. Three people, including one of our facilitators, were strict vegetarians, with two others saying they had been experimenting with not eating chicken or beef during the program.

By 6 p.m., having engaged in several physically challenging and rather emotional activities, the group had come together in an opening in the forest prior to dinner, to process the day’s events. The 18 participants were spread out in a large, irregular circle.
Inside the circle were two crates, which contained four squawking chickens. Next to the cages were a sharpened ax and a 10-inch knife. The group was told that the chickens were to be part of a chicken stew and that a pot of vegetables had been set aside for the two vegetarians so they could be part of the experience.

The incredulous momentary silence did not last long. One person said they would never eat chicken again if they were going to have to kill the “little beasts.” Someone else shouted that it was hypocritical to eat poultry from sanitized cellophane packaging but not be willing to undertake the deed itself. However, nobody was volunteering to actually kill them. Things rapidly deteriorated: Some individuals invoked religious beliefs concerning killing, and one recalled the childhood trauma relating to the “murder” of a favorite pig that led him to a life as a vegetarian. It was not a pretty sight as brewing interpersonal differences bled into the chicken conversation and people stood firmly by positions that had never before been challenged. Snickers, tears, and insensitive words were tossed out. The program leaders, predictably, were criticized by several of the group members for placing them in such an uncomfortable position—as if comfort was one of our goals.

As a result of this quite intentional design, the group’s aversion to conflict was breached, and the value in the event identified. Even though many still resented the activity, this essential design demonstrated the difference between nice and polite assertions versus authentic expressions that revealed who people really were. It was both fascinating and rewarding to have the group own up to how many of them had chosen to be less authentic since coming together for the program. Before the chicken challenge, they had carefully monitored unspoken pacts so that budding friendships were not disturbed and their membership in the group could be preserved. It sounded to us like most organizations and “teams” with whom we often consult.

The community members also agreed that unresolved conflicts exist in nearly every group, which opened up a discussion about how these pent-up frictions could, inevitably, result in dysfunctional norms and attitudes that, over time, can diminish trust and candor. The intervening chicken design uncovered secrets and unmet needs that were waiting to escape. In the aftermath of the first explosion, the community resolved their differences, began to discuss previously unmentioned tensions, and designed solutions acceptable to the group in relation to killing, dressing, cooking, and, yes, celebrating the chickens. There was little doubt that the group would never be the same—and they would most likely never approach leading their own teams in the same light again. As facilitators, we completed a
natural cycle of diagnosis (what did the group need at this time), risk in commit-
ting to a design to move the group forward, and evaluation of our effectiveness
in that process, which would set the table for our next designed activity based on
where the group appeared to be in terms of their needs and our goals.

**Essential Factors of Successful Design**

A successful design, of course, is a planned design. Without planning, it can
quickly devolve into a mess, which is not what the intentional facilitator desires.
Let’s dive into the anatomy of the Great Chicken Challenge to understand the
important factors to consider when approaching your own design, whether the
design component is for a single-agenda meeting or one part of a multistage event.

The specific goal of the Great Chicken Challenge was to generate authentic,
candid behavior within the budding team’s dynamic, whether or not they were
pretty and polite. All designs share a common goal, however: to better utilize
people during any meeting. To achieve that critical goal—our intention—we have
learned to pay attention to seven factors that are essential in any successful design
and guide our actions. Table 1-1 lists these factors, along with key questions to
consider. We discuss them in detail in following pages.

**Table 1-1. Seven Factors Critical for Design Creation**

<table>
<thead>
<tr>
<th>Task</th>
<th>Process</th>
<th>Variables</th>
<th>Benefits</th>
<th>Challenges</th>
<th>Accountability</th>
<th>Follow-Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the need?</td>
<td>What is the desired level of engagement?</td>
<td>How much time is needed?</td>
<td>What are the positive outcomes desired?</td>
<td>What could go wrong?</td>
<td>Who is accountable (and for what)?</td>
<td>How will the outcomes of the design be monitored?</td>
</tr>
<tr>
<td>What is the desired product?</td>
<td>How should individuals feel during the design?</td>
<td>Who will be present?</td>
<td>What is the value added?</td>
<td>Could there be any unanticipated consequences?</td>
<td>What are the measures of success?</td>
<td>How will we evaluate the design itself?</td>
</tr>
<tr>
<td>What is the problem to solve?</td>
<td>What is the physical setting?</td>
<td>What is the time of day?</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>What decisions need to be made?</td>
<td>Is there any conflict or unfinished business?</td>
<td></td>
<td></td>
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</table>
Task
When people come together to work, there are both task and process dimensions. Task has to do with the achievable goal and the actions necessary to reach that end. Often this is a problem to solve, a position to be argued, or a set of choices to make. The actions emanating from this task—the process—should result in satisfying the identified need. This need is the “what” or goal of the work equation: the desired outcome. In the Great Chicken Challenge, our desired outcome was to crack the egg of conflict aversion still holding the group captive and making them unwilling to be open and authentic. We didn’t know exactly how the scene in the forest would play out, because the group would have to fend for itself: Deal or not deal with the new dilemma that was rocking their reality. However, we predicted the group would leave the honeymoon stage of their group development and, hopefully, become more productive, honest, and authentic with one another. These, in turn, are the keys to real trust.

Process
Process is the sibling of task; however, since the global recession of 2008, bottom-line tasks have been the corporate mantra. The “what” of work—task—has continually trumped process—the “how” of work. This is true even though morale, productivity, and turnover are tied at the hip to process and, ultimately, to profits. Fear is the driver of this short-term, reactive management.

Balancing the what with the how is why people need conscious facilitators—and it’s the focus of a lot of design work. It is central to the notion of “engagement,” which is spoken and championed much more than it is lived or understood. Prior to the chicken exercise, what was not being said was debilitating to the cohesion and trust of the group, allowing superficiality to rule like it does in most relationships. In this instance, the program leaders decided to deal with this uncomfortable reality by utilizing the chicken design. This meant breaking the superficial, unspoken goals (or norms) of niceness and politeness with a challenging task that would force the group to look at the “how” of the task, the killing and dressing of the chickens. Once that task was accomplished, the group could use the successful experience to access the “how” of the group’s relationships, discussions, and decision making in other areas. Thus, we designed a laboratory for looking at such issues, a crucible of our making for the group’s learning and development. Our intention was to force such engagement, which we hoped would lead to greater honesty and trust. Such opportunities to learn from each other rarely occur in the rushed and time-bound
world of most organizations. The result are cultures where planning and conflict resolution are often avoided and crisis reaction thrives.

As facilitators, you also know many groups where superficiality rules. In these groups, conflict goes underground, and risk taking is, at the very least, limited. As a result, people often do not hear what they need to hear, especially if the speaker fears such messages will end up being criticized. Carefully planned intentional designs seek to upset any dynamic that compromises trust. Therein lies the creativity of design and the challenge to the facilitator to move the group forward. The chicken activity was a risk for us because we could not control the response of the group and knew it would alienate some in the process. We also knew that talking to the group intellectually about their rising aversion to conflict would not change that reality. One can begin to see how we needed both task and process to be aligned if the design was to be successful.

Variables
While never ideal, the givens or variables often define a situation and have a large impact on what is possible from a design perspective. An available budget, a limiting timeline, unresolved conflict in a team, past failures or successes, and strong personalities in the mix are typical variables at work that influence a situation. These factors need, at minimum, to be considered with their consequences anticipated. This fact prompts increased complexity in the facilitator’s thinking and eventual acting. In the chicken situation, we were limited by the time of day and time available to do our design. We were limited by the nature of the physical space, although we intentionally moved the group away from the comfort of the camp itself. We were also limited by our fear that the group would not see the relationship between the extreme design and the dysfunctions within their group. The consequence might be the alienation of the group with one another and us. There is a certain comfort that comes from living in ignorance, and denial is the easiest way to maintain such comfort. After all, it requires courage, honesty, vulnerability, and work to overcome the natural deceptions and dishonesty that are perpetuated, often for years, within some teams, committees, and even families. As facilitators, we took the risk in favor of candor, openness, and trust in the service of authenticity.

Benefits
Like in any venture, if the benefits of the desired outcome don’t outweigh the
risks, it would be a good idea to run. But this requires a certain hard-nosed scrutiny of reality and the willingness to diagnose both the benefits and challenges to the team. Normally, benefits are translated into profits, increased morale, continued work opportunities, or measured trust. In theory, every time a facilitator takes an hour of their team’s collective time, the outcome should increase some of these factors, which perhaps stimulate curiosity, lead to a success of some kind, or generate useful information or the solution to a problem. But, instead, often meetings are predictably boring, proving to be of little value to the participants. Imagine the influence this has on morale and participation, as members bide their time until the end. Then they leave with the less-than-ideal feeling of relief. And that is what they bring to the next meeting. With all the stress our chicken design created for the group, we thought the benefits would push the group to a new and necessary level of both trust and effectiveness.

**Challenges**

For every action there is a reaction. Your job as facilitator is to presuppose the reaction to everything you do. If there are potential negative consequences to a design, what are they? Can they be overcome? Do the benefits outweigh the challenges? How do you overcome skepticism or fear among the team, and turn their uncertainty into confidence? How is a recent failure translated into a learning opportunity instead of guilt or shame? Motivating the unmotivated is a challenge, as is learning from a failure or just considering unanticipated consequences for any action the team takes. Was the band of participants gathered in Temagami with us ready to handle their own dysfunctions and leave behind the unrealistic norms guiding their group and limiting their progress? Would the small window of time between 6 and 9 p.m., when darkness takes over, be sufficient to bring the necessary closure and healing to the predictable stress we created? Could we find the necessary chickens in an area where few exist because of the cold winters? Had we provided the group with the skills to pull off their own recovery once the lid was blown off the tight container of conflict aversion? All these issues needed to be addressed.

**Accountability**

In your experience, how often have meeting participants promised to accomplish certain tasks by a certain date or by the next meeting? And how often are apparently good ideas discussed during a meeting, then later dismissed by participants
after they’ve promised action? There is nothing more demoralizing than promises not being kept by some, and this influences the work of others who did keep theirs. Not only are promises often not kept, but rarely are there any consequences as excuses and blame come to the rescue of those who have not been held accountable. Any good design needs to have built in accountability. When teams don’t trust each other, aren’t open to feedback, or fear alienating their peers or their bosses, a lack of accountability will surely follow.

This was such a risky and pivotal design for the life of this group, we had to have contingency plans in case the group imploded and recovery was not happening as we had hoped. As the planning team, we were accountable; we had to be prepared and on the same page, recognizing plenty of room for failure. Trust had to be absolute. Thus, accountability among us was critical in both the real-time application of the design and the follow-up. Follow-up is important enough to have its own category.

**Follow-Up**

Didn’t we agree to that before? Wasn’t that Jim’s to undertake? Didn’t we lay out that plan in October? The failure of accountability will undermine any effort. Without agreed-upon, specific follow-up—and without identified, measured outcomes—success will be short lived. That said, people often live with unfulfilled commitments with no consequences. The result can be a slow degrading of trust. Thus, we have to ensure accountability to the measured outcomes, creating follow-up and monitoring activities that include tracking commitments. This is a critical part of any team or design. Assessing consequences and addressing them, if necessary, is key to any facilitation. Hard-nosed critiquing is essential to this and what occurs next.

Our chicken design was not a “one and done” event. The results would reverberate for the next nine days of the group’s life. It provided us with rich information that would drive us as well as the group forward. Obviously, it was tied closely to accountability. It was also a perfect example of how an intervention in one area can influence the rest of the “system” as it moves ahead and develops. Thus, personal relationships within the group would be influenced, as would the trust toward us and among the rest of the participants. And, if other unanticipated consequences of the design arose, we had to be prepared to deal with them. For example, once the group decided that it wanted to be more open and forthcoming, committed to dealing with conflict as it arose, it was essential not to let the group go back to sleep.
The facilitators could not permit them to revert to ignoring conflict as it raised its head, which it surely would. As suggested previously, good intentions will not drive change by themselves. New rigor and discipline among the group must be cultivated consciously, probably alongside new ground rules and built-in guidelines regarding feedback. All that demands more work, more courage, and more commitment among the members. It would be just plain easier to return to the old patterns of denial, avoidance, and superficially nice relationships—which is exactly why facilitators are needed and, among other reasons, we wrote this book.

Facilitation and Design

If you keep these seven factors in mind as you create designs to build team cohesion and productivity, they will soon become as natural as any habitual aspect of leadership or management. Each step will flow easily into the next. And, as you commit yourself to utilizing interesting and creative designs, your repertoire, along with your courage, will expand. That is the challenge: to internalize the steps until they change the way you see the team or the meeting, while gaining the confidence to risk even more creatively.

As facilitators increase their diagnostic skills and extend their repertoire of tools, they realize that designing ways to move a team or system forward is a creative act. There are no boilerplates, no predesigned formulas for what to do. Instead, facilitators ask, “What can I create that will benefit the group, overcome resistance, or accelerate the work as a team?” And, at the same time, “Can I make the activity more fun or interesting—or both?”

To set you securely on that path, as promised, 13 classic designs are provided in the second part of this book. Through them, you will learn how to develop carefully designed activities and strategies that are meant to elicit specific constructive behaviors from people: to legitimize their sharing of emotions and feelings, confront hard realities, solve difficult problems, and better understand the complexities of groups, teams, and entire organizations.

Designing will often feel like plotting an expedition. It’s serious work that demands meticulous attention. In the extreme, it’s like Ernest Shackleton and the crew of the Endeavor, stranded for two years with temperatures often below –40 degrees, hopelessly lost without sufficient food or clothing on the Antarctic ice floe, their ship having been crushed by the relentless ice. But, in the end, and because of the crew’s courage and Captain Shackleton’s leadership, not a single man was lost. Captain Shackleton had most of the skills we have identified. His men loved him,
yet he was incredibly rigorous and meticulous in everything he did. And, every-
thing he did had consequences for which he was accountable, whether doling out
grog for a party to lift the crew’s failing spirits or bringing ordinary seamen into the
decision-making process. He patiently and strategically “designed” their survival
and their escape from certain death. Virtually everything he did was intentional
and visible to his crew.

In today’s business world, the thinking is the same, albeit the consequences less
severe. It’s a disciplined way of both thinking and acting about every action you
take as a facilitator.
ABOUT THE AUTHORS

Rodney Napier

For more than 40 years, Rod has had the privilege and challenge to work with teams and organizations on four continents, in more than 20 countries, and in every conceivable kind of institution, from convents, hospitals, and corporations to the Army Corps of Engineers, the government of Nicaragua, and Outward Bound. He is currently in his 10th year teaching graduate courses at the University of Pennsylvania in conflict management, executive coaching, and planned change. Along the way, he has authored or co-authored a dozen books, including seven editions of Groups: Theory and Experience, the seminal text for 20 years in the field of group dynamics; Measuring What Matters; The Courage to Act; and the upcoming The Seduction of the Leader. His books are theoretically sound, research based, and directed at providing applied, actionable responses to the kinds of problems that regularly face most teams and organizations.

Over the past dozen years, Rod has focused on the skills needed for effective meeting design, along with the strategies that differentiate successful leaders and facilitators from those stuck in the world of predictably boring lectures and PowerPoint presentations. Through the use of videos and animation, Rod and his partner, Eli Sharp, are opening the door for many leaders to a new world of
About the Authors

exciting and highly relevant designs and, consequently, meetings of all kinds. In the process they bring years of understanding that almost anyone can now access. All that is required is a willingness to learn, and the courage to risk using new designs and some behaviors that have often lain dormant for many years.

**Eli Sharp**

Eli Sharp is a recognized expert in Japanese Lean and Six Sigma methodologies. She travels extensively analyzing and improving business, manufacturing, and transactional processes; helping groups work more effectively together; teaching and facilitating teams; and providing coaching to senior leadership.

Integrating process and systems optimization, group and leadership development, and individual executive coaching, Eli provides a holistic strategy to her clients and various techniques to help individuals, teams, and organizations. Her approach is tailored to meet clients’ hard and soft needs.

Everything Eli does is grounded in theory. She draws from engineering, business management, continuous improvement, organizational dynamics, and coaching, and works with the practical application of theory, teaching the tools, analyzing complex issues, and making people’s lives easier. Her home is at the Gemba—the Japanese term for “real place” or where the work gets done, with the people who do it. She does not preach solutions that lack a real-world context.

Eli has built and led many incredible teams over the past 25 years. She works hard to provide her clients with tools and skills throughout her engagement, so they continue to grow and succeed independently.

Eli has worked in many manufacturing organizations, including hydraulics, food packaging machinery, and medical devices, and has consulted internationally in organizations as diverse as financial services and healthcare provision. She is adept at tailoring her approach to suit different national, organizational, and industry cultures. Her philosophy is to enter the clients’ systems with respect and humility, gather data to fully understand the situation and issues from multiple angles, strategize and plan for specific improvements, then help execute the plan, monitor results, and support sustainability.
Eli holds a master’s degree in mechanical engineering from the University of Exeter, and is a Chartered Mechanical Engineer. She has an MBA, specializing in operations management, from the University of Plymouth, and a master’s degree in organization dynamics (organizational consulting and executive coaching) from the University of Pennsylvania.
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