



MAKING INSIGHTS MORE IMPACTFUL TO BUSINESS GROWTH

Workshop Masterclass

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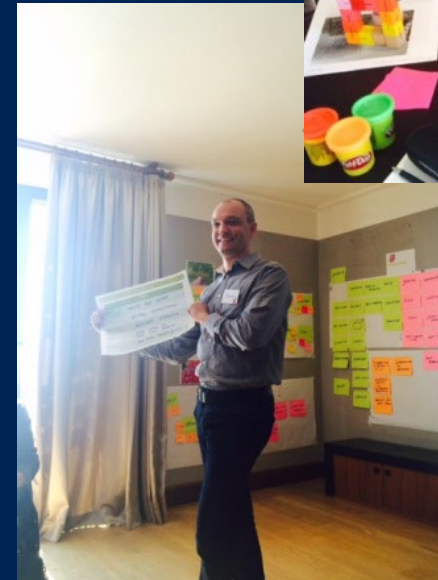


"I hear and I forget.
I see and I remember.
I do and I understand."

Confucius

Our Purpose

To share best practice principles in workshop facilitation (face to face and virtual) for application to everyday business challenges



Our Agenda

Time	Activity
1.30 – 2.00	Introduction, Objectives, Agenda, Good vs Bad Workshops
2.00 – 2.30	How Workshops Work
2.30 – 3.00	Top Tips for Workshop Success - Objectives and Design
3.00 – 3.15	BREAK
3.15 – 3.35	Diverge / Converge : Putting it into practice
3.35 – 3.45	Facilitation Principles
3.45 – 4.00	Virtual vs Face to Face
4.00	OPTIONAL : Facilitation tips and tricks from the experts

ACTIVE LISTENING





**EVERYTHING IS
POSSIBLE**



TEAMWORK

BE POSITIVE



USE MOBILE DURING THE BREAKS



Questions very
welcome at all times

Some may be more
suitable for another time -
those will be collected in
the car park

Let's get to know each other



Sue Phillips
Global Leader, Insight for
Impact,
Ipsos UU

- Your name,
- Your company and role

If you could introduce yourself as a brand, what brand would you be?



Building your team mascot

Lego fun

Best team name + lego mascot connection

1. Nominate a Team Captain
2. Team Captain will have 30 seconds to 'pitch' why your mascot is the best representation of your team name.



VOTING FOR THE BEST TEAM MASCOT

MENTIMETER

BEST TEAM NAME + LEGO MASCOT CONNECTION



MENTI.COM

CODE: 9860 4746



Why warm up?
What did I do to set
the scene?

Expectations for today



Live action example
of a virtual workshop



Checklists to help
you design, set up
prep work, facilitate
and do outputs



Quick pace and
interactive:
content will be
provided afterwards



Message Anne on
WhatsApp for tech
issues

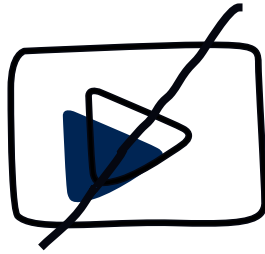


Interrupt us with
questions

Virtual workshop behaviours



Setup your
name
on Teams



We will not be
recording
and ask you also
not to
record this
training



Always have
video on



Always be on
mute unless you
are asked to
unmute

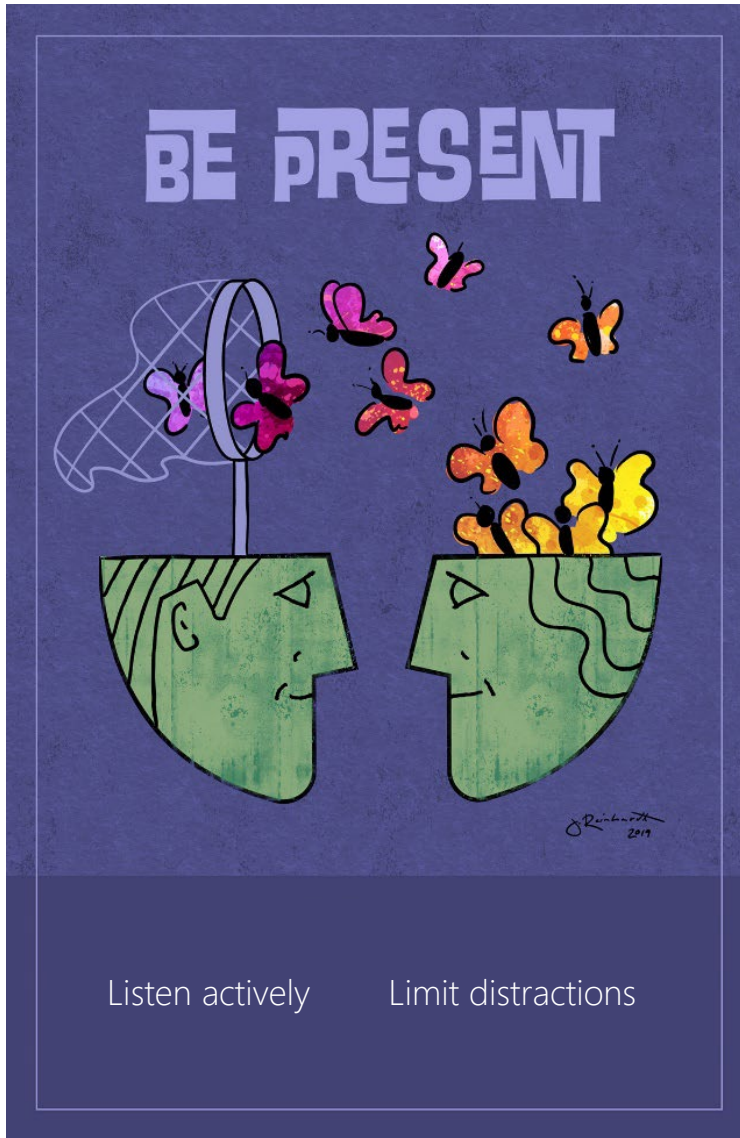


Raise your hand
if you have a
question or
something to
add



We welcome you
to have Mural
open throughout
the session

Guidelines for making these sessions a success



What is a GOOD workshop?



What is a BAD workshop?



1 idea per post it



**Fashion
show**

**Personal
Colouring
Advice**

**Family
Day**

Clear handwriting

More chance to be selected!



What is a GOOD workshop?



What is a BAD workshop?



What is a workshop?

A **collaborative working session** in which a team achieves an agreed goal together.

Goal : solve a problem, create ideas, work through an issue, align ...

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



What are the different types of workshops?

A 1 hour
brainstorm

An
alignment
workshop

A creative workshop
(eg innovation
insights)

A brand
positioning
workshop

A debrief workshop

A kick off
workshop

Insights to Action
Workshop

How Workshops Work



How workshops work

- While you listen to this presentation, I would like you to have ONE question in mind:
- What are the Implications for how we run workshops? Eg we should do more .. Less
- Use your listening sheet and put post-its onto each side as you listen



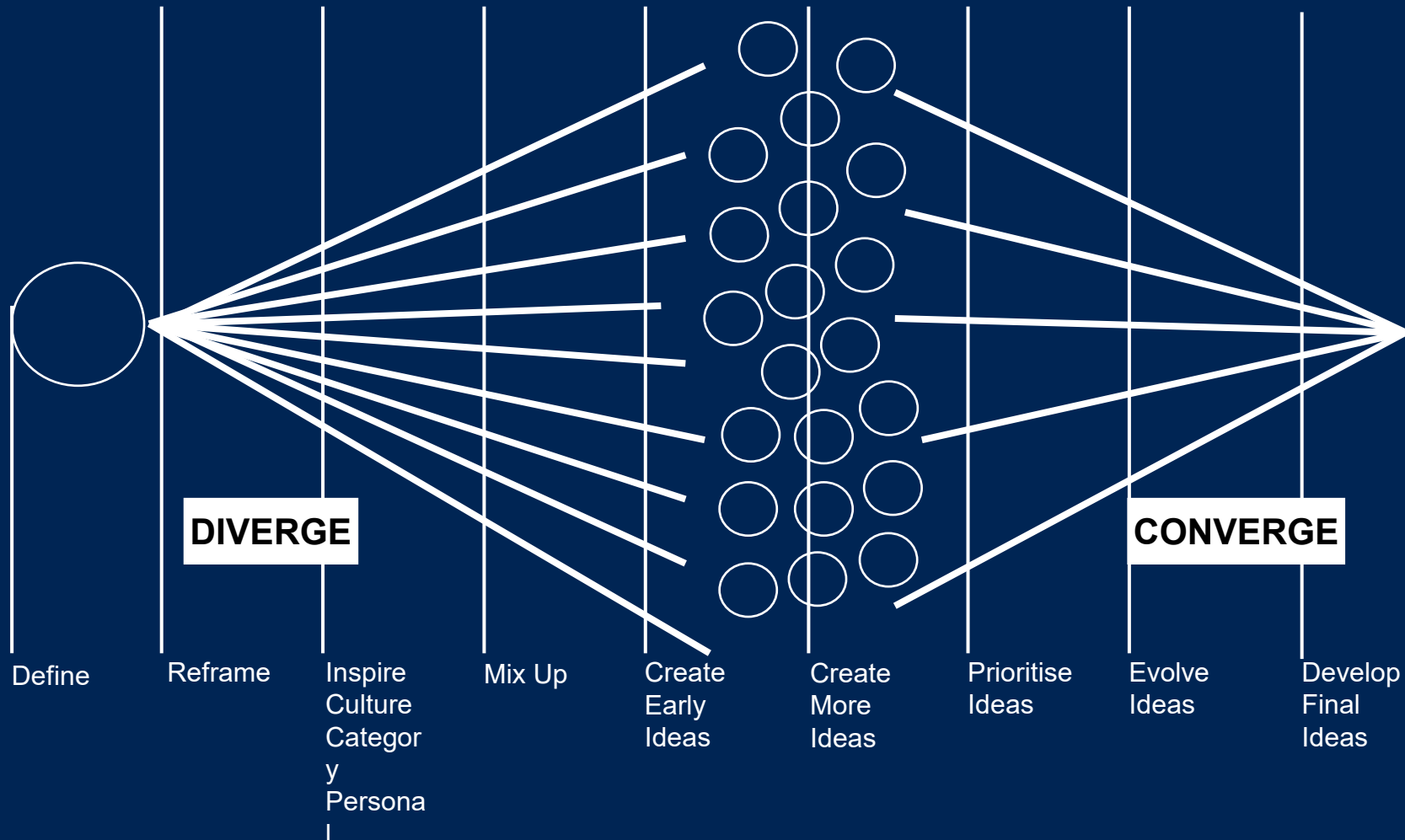
What should we do MORE?

What should we do LESS?

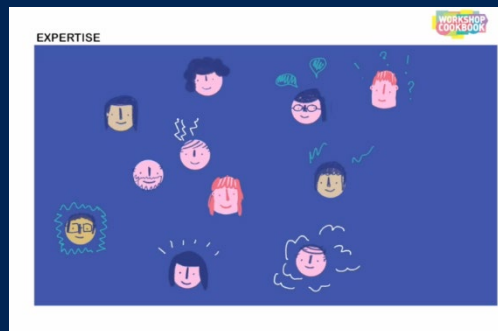
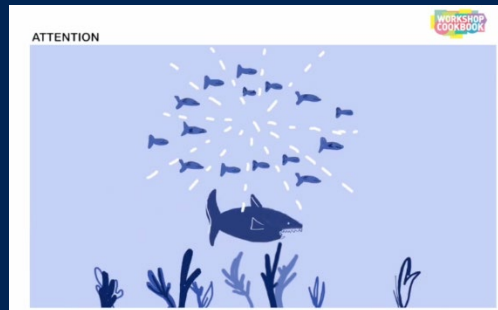
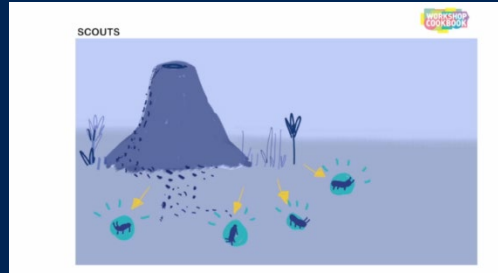
1. Tangential pathways



2. Diverge and converge



3. Collective intelligence

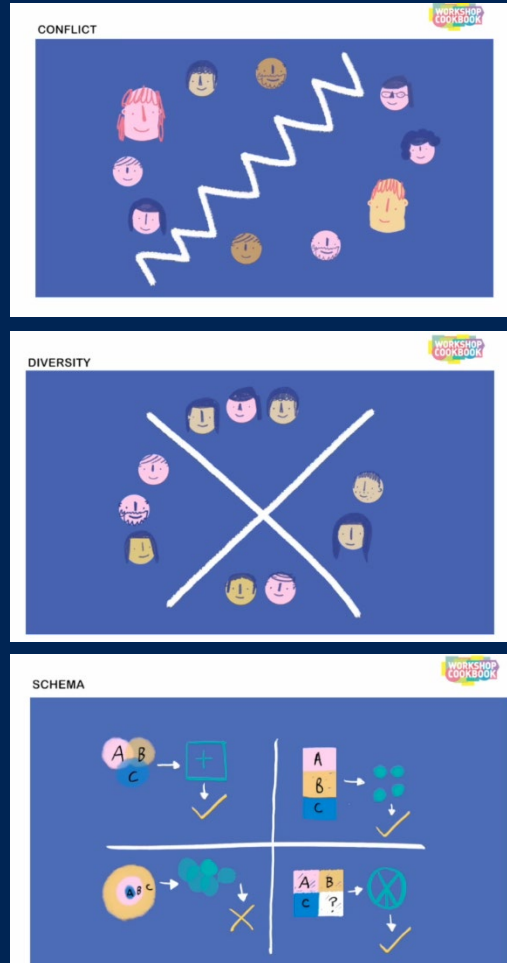


Get different input
perspectives with
SCOUTS

FOCUS attention on limited
information

Rely on your
TRANSACTIVE GROUP
memory system

3. How workshops work – collective intelligence



CONSTRUCTIVE CONFLICT
to avoid belief convergence

Insist on gender, ethnic and
function **DIVERSITY**

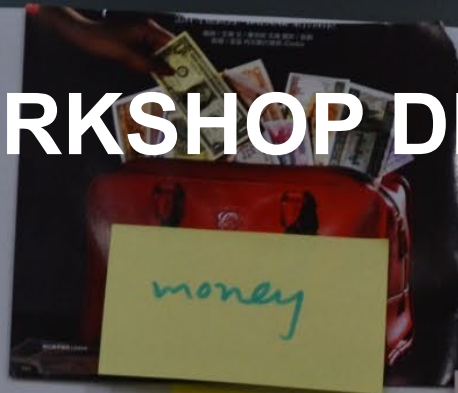
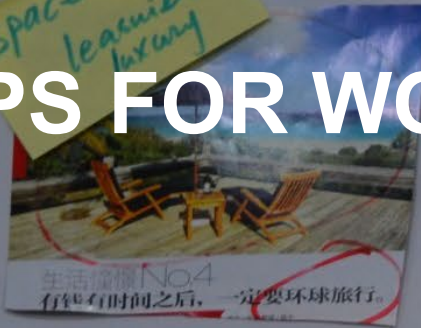
Use varied **SCHEMA** and
STIMULUS

What should we do MORE?

What should we do LESS?

TOP TIPS FOR WORKSHOP DESIGN....

space.
leisure
luxury

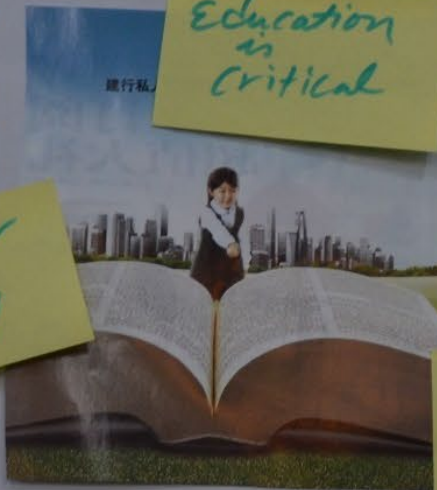


money



Good for
value

NOT so
central position
Kid



Education
is
critical



affordable
luxury



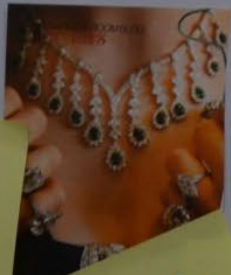
freedom for
buying

Success
in career

House for
good
quality



Health &
look Good



Statement



Good being
together &
smooth relationship



Your path to successful Workshops

4

1

2

3

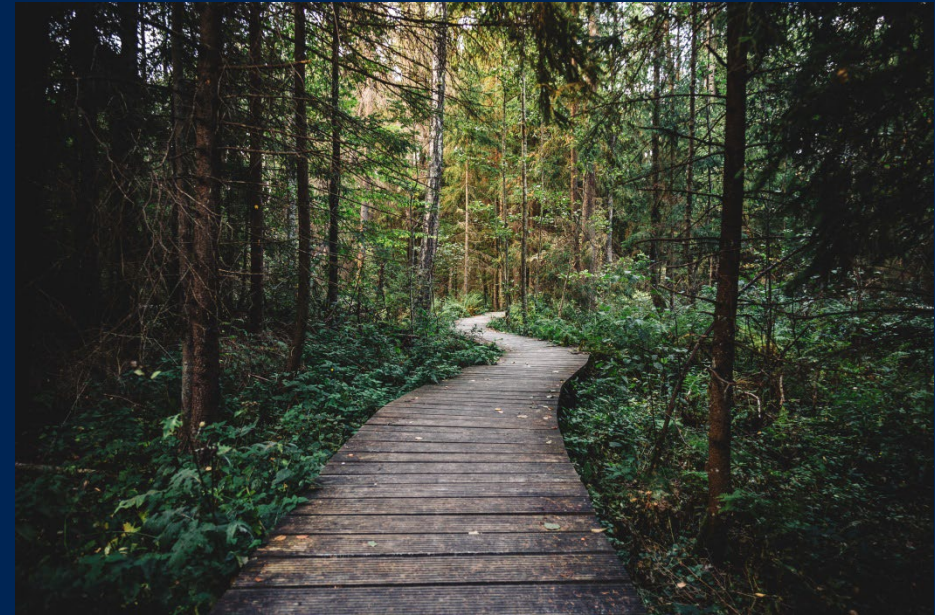
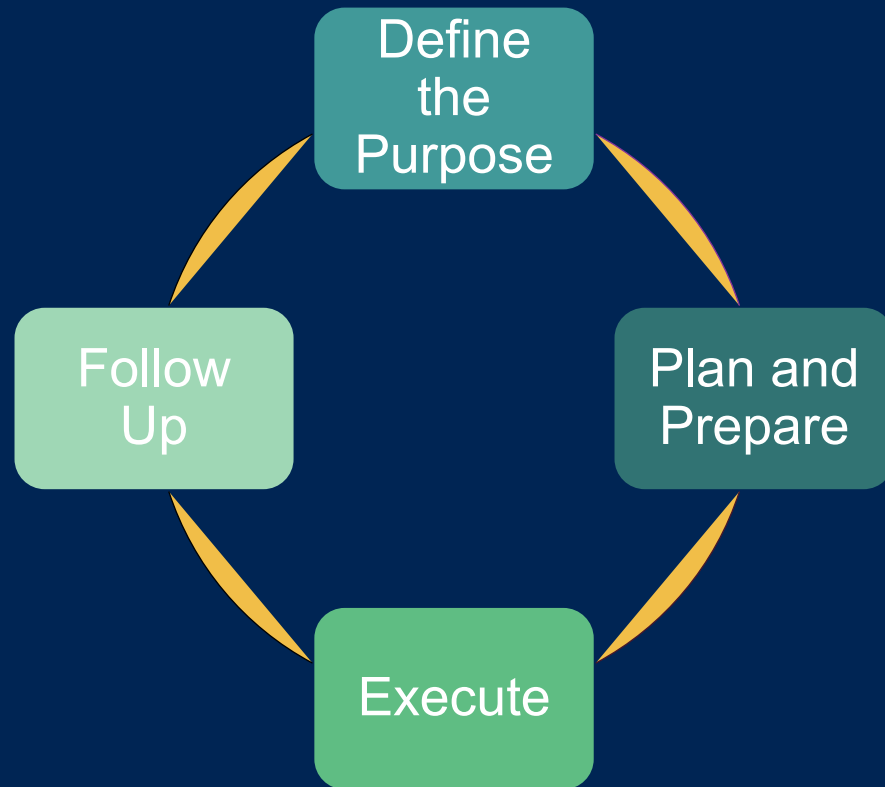


**Every
workshop will
be different!**

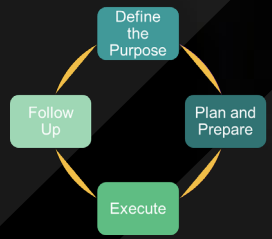
But quality consistency is possible



Four steps to successful Activation*Workshops

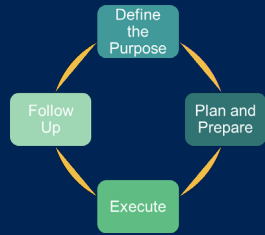


Defining the Purpose



Defining workshop purpose

Why is it important?



If you don't know where you're going, how will you know when you've got there?

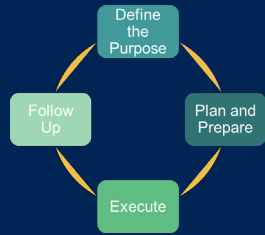
A purpose should be:

- Specific... in what you are trying to achieve
- Clear... so everyone can understand what we are going to do
- Relevant ... so the participants think it is worth their time

It is critical to identify and discuss and agree this with your key stakeholders

Defining workshop purpose

Getting to the heart of the matter



It can be a challenge to establish the real objective

Stakeholder says

I want an insight generation workshop

I want a segment activation workshop

What they really want

We've tested these comms ideas several times and we just can't get it right

We're losing share and I've got to do something to get the team focussed

A starting point

“To understand the tracking data and create some ways for us to improve our communications”

“To develop strategies to grow the business”

“To understand the research to take actions”

“To bring segments to life to position our brands”

“To activate the customer satisfaction results”

“To position our brands against consumer needs”

Even better!

“To use the tracking data to **inspire** ideas that will positively **transform** our communication in the future”

“To identify **three key** opportunities for growth for xyz and **specific point of purchase** activities to capitalise on them”

“To use the **latest consumer** data to identify **penetration** growth opportunities for x

“To **immerse** team in segmentation in order to **develop distinctive** positionings for brand xyz

“To generate **short term** solutions to **improve our customer** experience and **increase recommendation**

To **align** our stakeholders to develop a **distinctive positioning** that will **drive growth** for xyz brand

Objective Setting Virtually

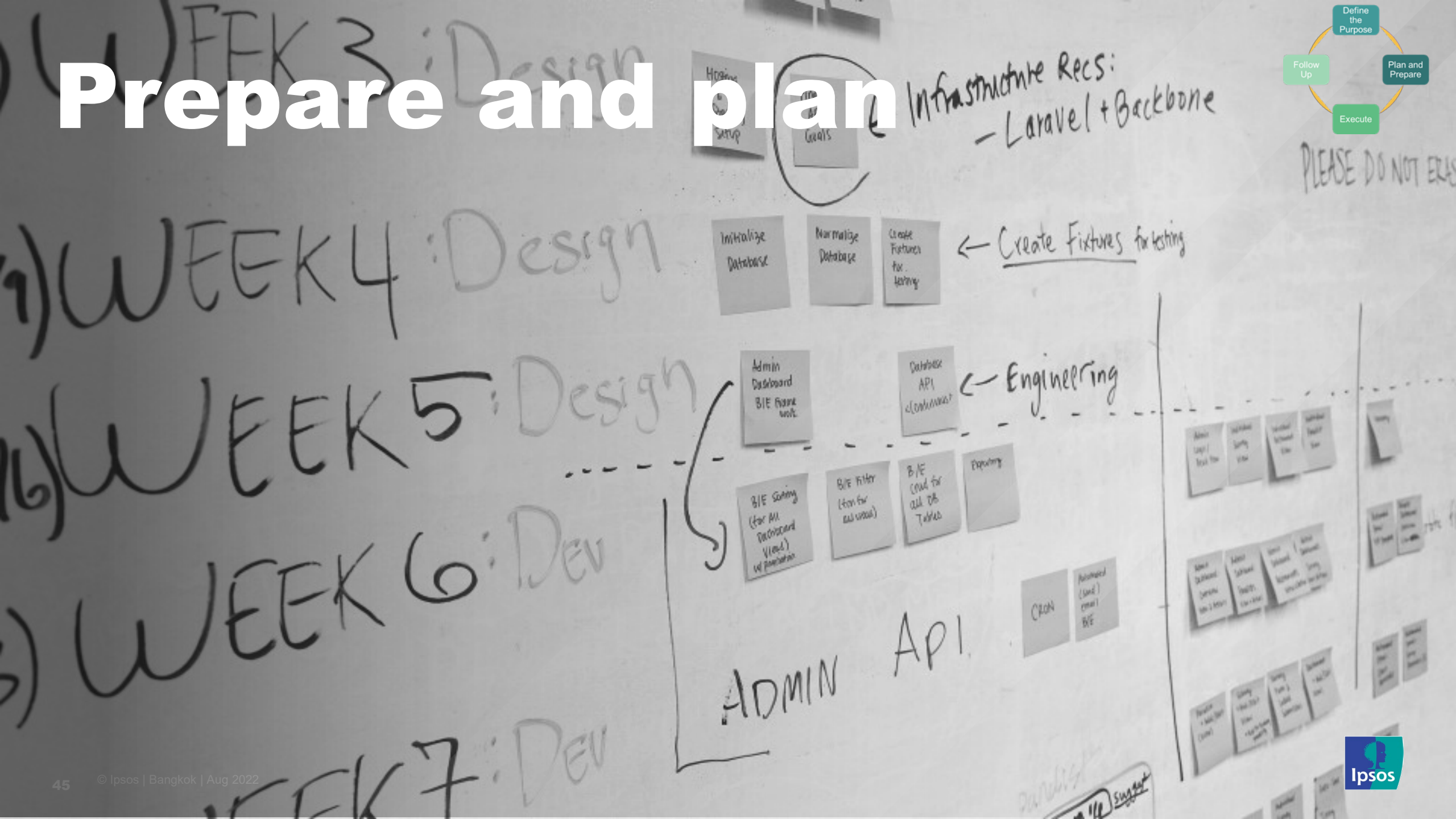
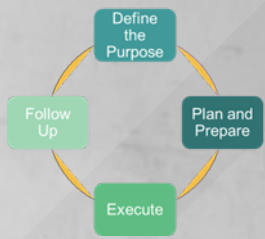


1. Equally important to set objectives in a virtual workshop
2. Most objectives can be addressed virtually – main challenge is lack of human interaction so team building may be more challenging
3. Attention to the time you may need to achieve the objectives you set. May need to be done across a series of shorter sessions vs one 'big show'

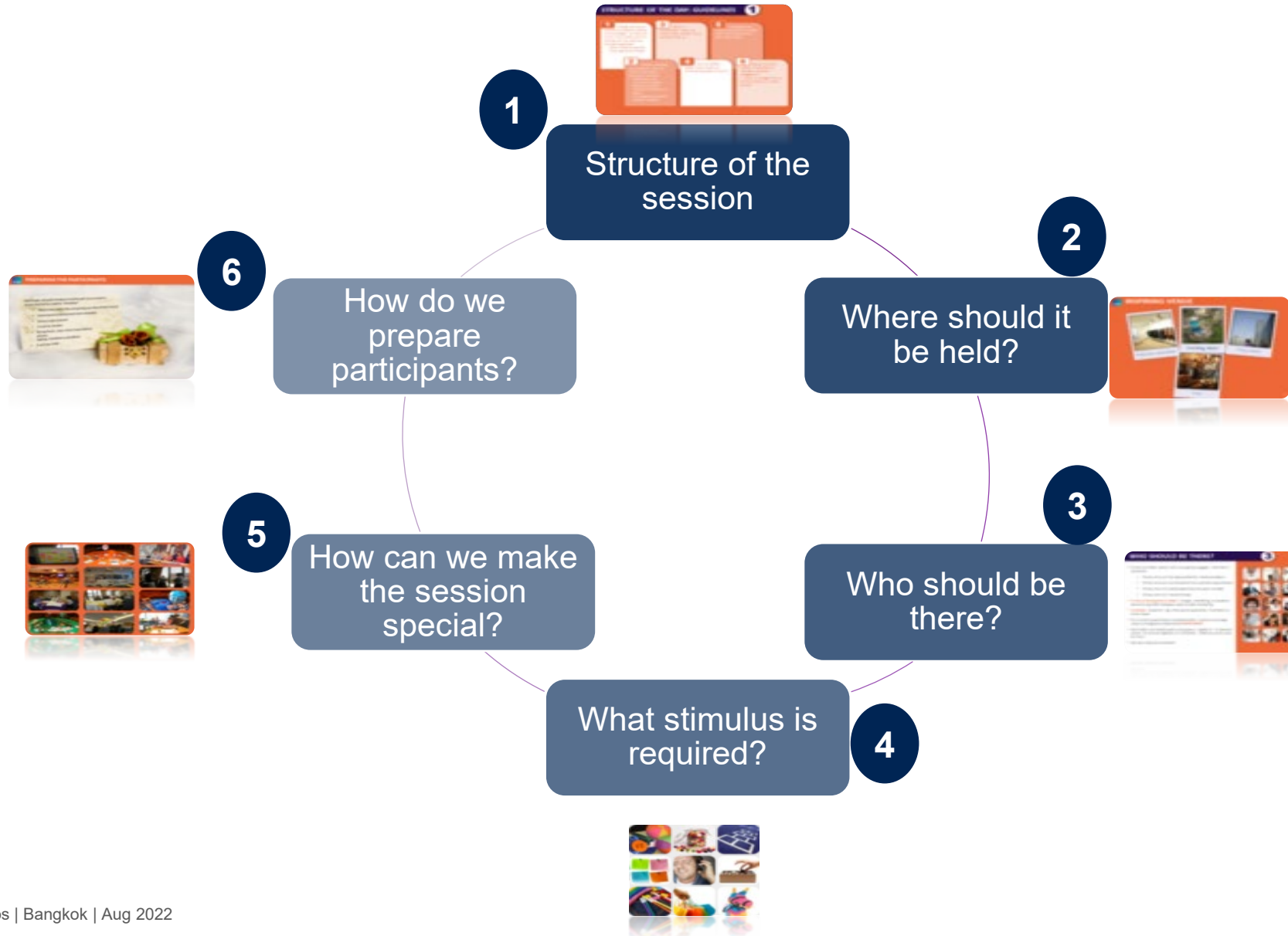
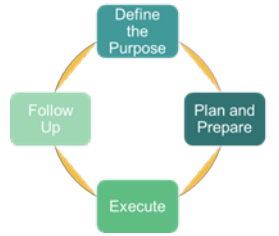
Questions about Objective Setting?



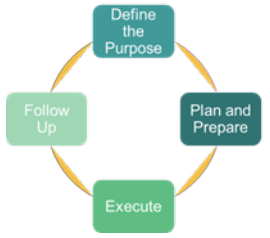
Prepare and plan



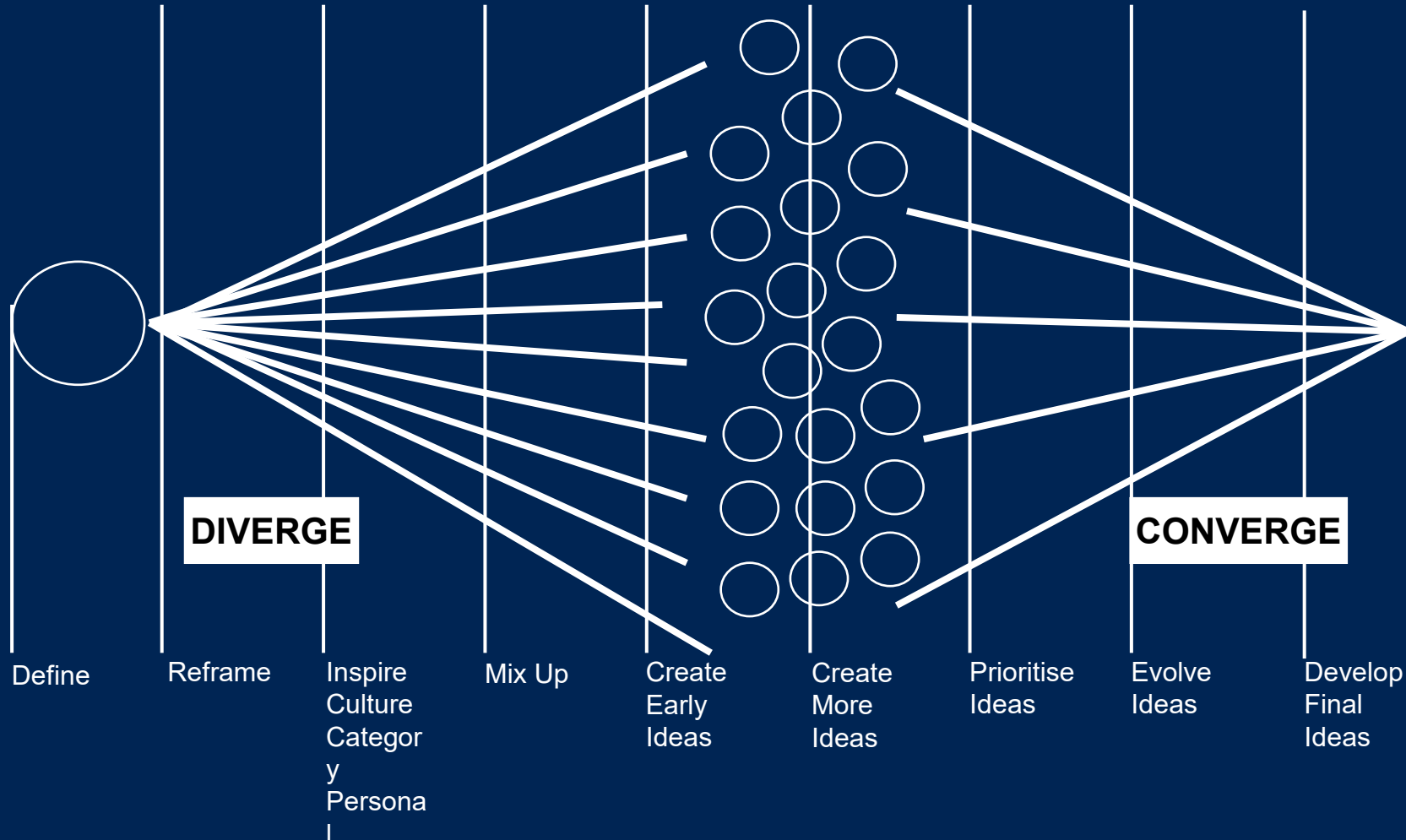
Working with your stakeholders determine ...



Working with your stakeholders determine ...



Structure according to nature of activity : Diverge and converge



Three simple phases for ANY workshop

	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	A big 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 theme to combine the best elements and express the essence of the idea	A small list of the best ideas, well expressed and clear, with ideas for actions and next steps

A close-up, macro photograph of several dark brown, roasted coffee beans. The beans are piled together, with one bean in the center foreground being particularly sharp and in focus, showing its characteristic crack. The background is softly blurred, creating a sense of depth. The overall color palette is warm and earthy, dominated by various shades of brown.

COFFEE BREAK BACK IN 15 MINS

**All ideas
are good**





**EVERYTHING IS
POSSIBLE**

BE POSITIVE



IDEA BOOSTERS...

THE ATTITUDE TO BOOST CREATIVITY AND INNOVATION IN YOUR ORGANISATION

Yes, and... Let's find the concept behind it...

Wow, interesting... **YES!** Maybe now is the right time...

You are on to something... Good, let's enrich the idea...

How do they do this in other industries?... Tell me more...

Let's look at the financials later... Let's ship!

Our industry is ready for disruption... Let's experiment...

Great! LET'S MAKE IT EVEN MORE CONCRETE...

It's time for change... I will try it tomorrow with one client...

What's the worst thing that could happen?... What are we waiting for?...

WHAT IF A COMPETITOR WOULD STEAL THIS IDEA?...

I love you! Let's spend the lunchtime on it today...

Convince me in 3 minutes... **I feel the potential...** Why the hell not...

Find a problem... **Fix it...** Start a company...

Stop discussing... **Start doing!**

LET'S KICKSTART THIS PROJECT!

Poster from the book: Creativity in Business
Download your own poster at: www.ideaboosters.net



IDEA KILLERS...

REASONS WHY CREATIVITY AND INNOVATION DON'T FLY IN YOUR ORGANISATION

Yes, but... It already exists! Our customers won't like that!

WE DON'T HAVE TIME... **NO!** It's not possible...

It's too expensive! Let's be realistic... That's not logical...

We need to do more research... THERE'S NO BUDGET...

I'm not creative... We don't want to make mistakes...

The management won't agree... **GET REAL...**

It's not my responsibility... It's too difficult to master...

THAT'S TOO BIG A CHANGE...

The market is not ready yet... Let's keep it under consideration...

It is just like... The older generation will not use it...

WE ARE TOO SMALL FOR THAT...

It might work in other places but not here...

SINCE WHEN ARE YOU THE EXPERT?... That's for the future...

There are no staff members available...

IT IS NOT SUITABLE FOR OUR CLIENTS...

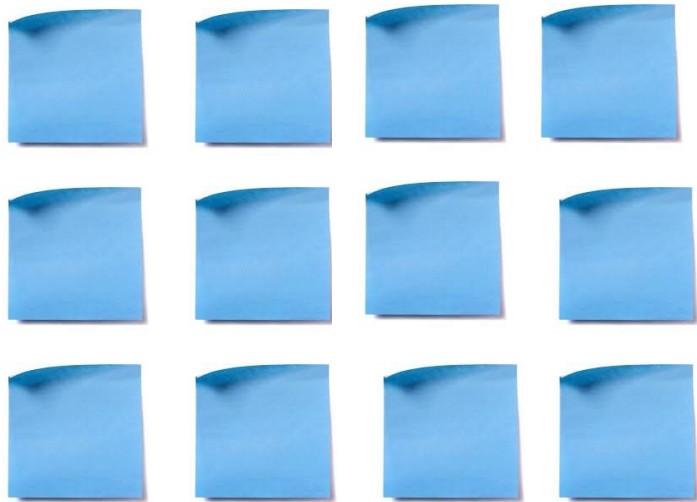
Poster from the book: Creativity in Business
Download your own poster at: www.ideakillers.net



Let's **CREATE**: 10 mins

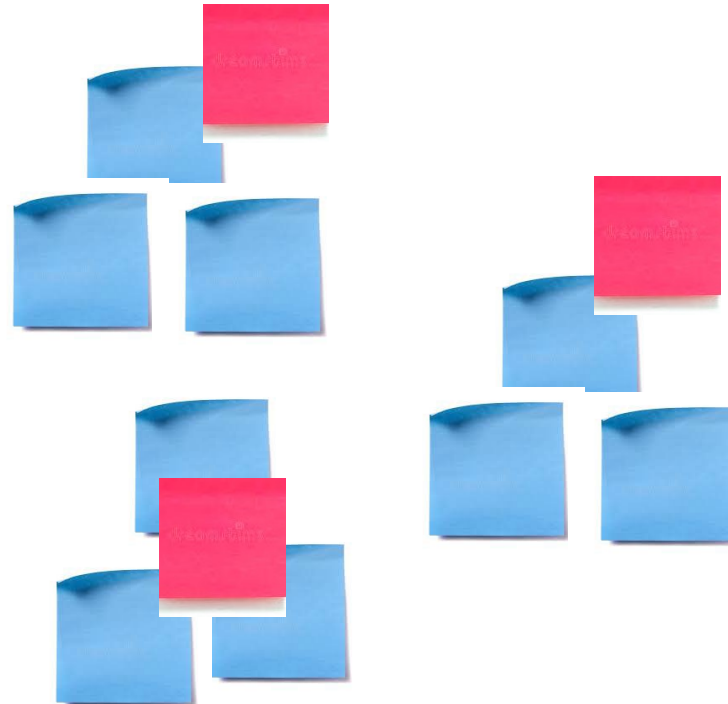
4 mins

Generate as many different reasons or purposes you could run a workshop in your business



6 mins

Theme the ideas together and give each theme a title



OR



**Challenging to
facilitate**

Partner with Experts

**Identify
Specialists**

**Easy to
facilitate**

Comfort Zone

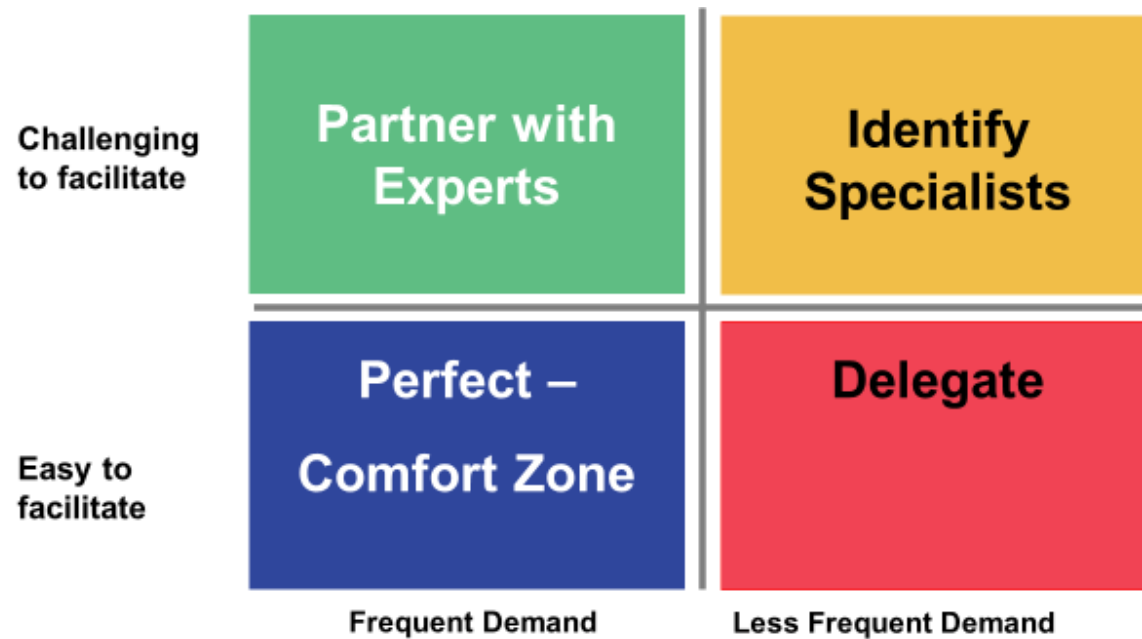
Delegate

Frequent Demand

Less Frequent Demand

Let's EVALUATE : 5 mins

2. Use this template to select and prioritise how you will use workshops in your organisation



57



Let's (not) DEVELOP!

**Take each of the best 3
ideas and develop
them further**

Top 10 tips for developing an 'insights to action workshop' schedule

1 Identify the **business question** the research is designed to answer FIRST

2 Determine precisely (not vaguely) what the **outcome** of the session will be and work back from there. What do you want to end up with at the end of the workshop?

3 How much **time** will you have in total (again, be precise here)

4 How many **people** and WHO are they?

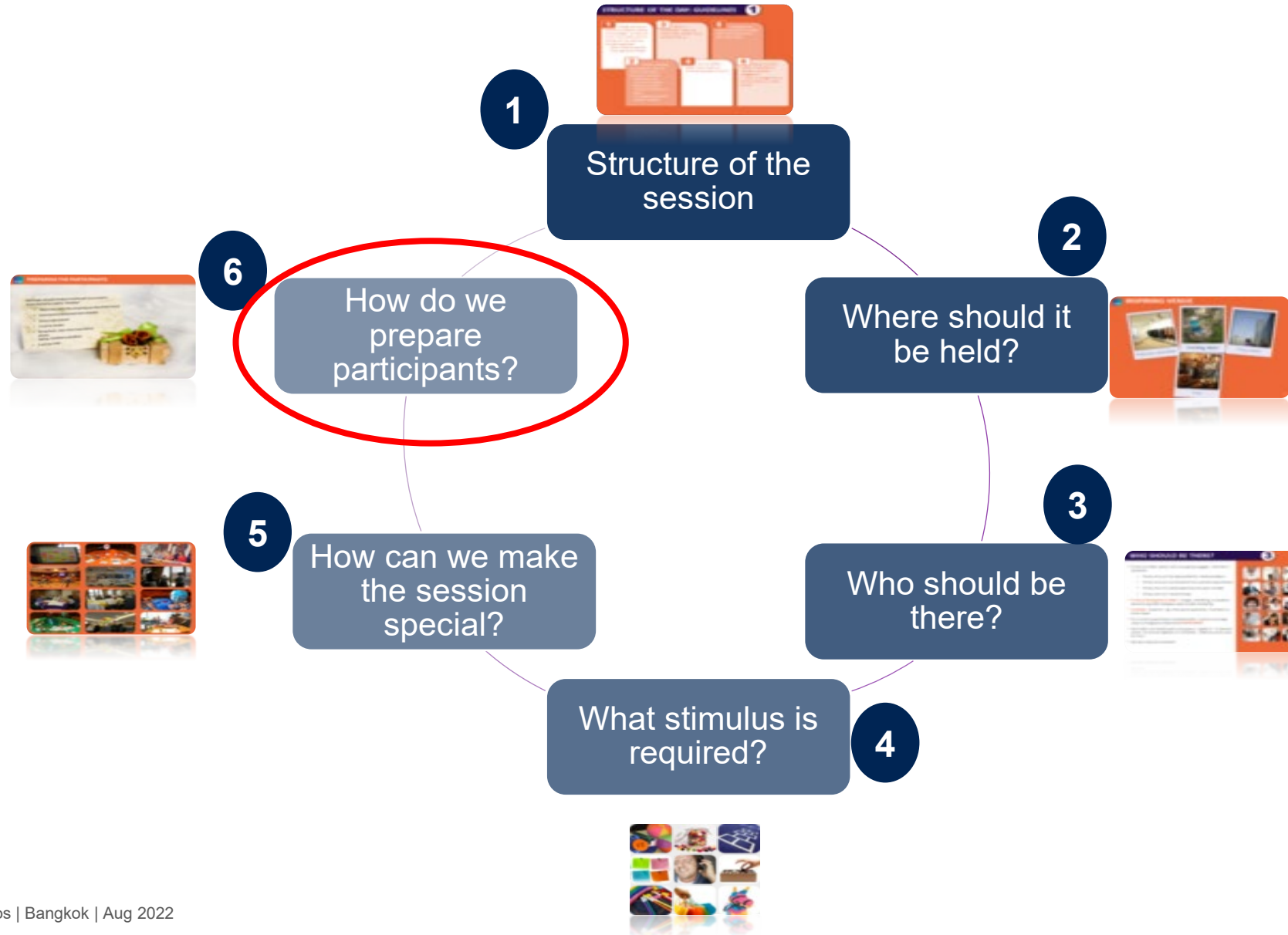
5 Your **research/data is stimulus** for answering the business question. Be very selective about what you share. Not EVERYTHING will be relevant to helping the team answer the business question. '**Chunk down**' the insights into two sections that make sense to the business questions

Top 10 tips for developing an 'insights to action workshop' schedule

- 6 Identify **OTHER material** that might act as stimulus (product, advertising, clips of social media, web pages, CONTEXT – images/ video of people using the product that bring consumer closer)
- 7 Plan session in **20 or 30 minute BLOCKS** with different activities per block. Feedback time will depend upon size of audience but is KEY to build in to ensure decision making is collaborative.
- 8 Ensure a **VARIETY of formats and exercises** to ensure a) the challenges are well explored and b) maintain energy and engagement
- 9 Open up (**diverge**) early ... and ensure close down (**converge**) towards the end so people feel decisions are being made
- 10 Close with some **reflection** and note next steps to ensure there is follow up and clear accountability

Time	Activity	Details	Person
9 – 9.15	Introduction	Goals of session Each person to introduce themselves in a way relevant to subject ... and their goals for the session Introduce format	Client Insight Director (Ipsos Presenter) Ipsos facilitator
9.15 – 9.45	Presentation Part 1	Introduce template and instruct purpose Present key slides	Ipsos facilitator Ipsos Presenter
9.45 – 10.15	Share feedback	Ask teams to share their feedback Collect and theme	Ipsos facilitator
10.15 – 10.45	Presentation Part 2	Introduce template and instruct Present key slides	Ipsos facilitator Ipsos Presenter
10.45 – 11.15	Share feedback	Place the post-its from each of the questions onto different flip charts. Theme.	Ipsos facilitator
11.15 – 11.35	Actions	Work in 4 teams to develop recommended actions around each of the 4 areas	In teams
11.35 – 12.00	Share actions	Each team debriefs their actions	Ipsos facilitator

Working with our Client to determine ...



6. Preparing the participants – get them excited!



The image shows a close-up of hands wearing blue gardening gloves planting seeds into the soil. In the top left corner, the Bayer logo is visible, consisting of the word 'BAYER' in a circle.

We are delighted to invite you to an immersive experience designed to give you insights and inspiration to help you grow the Bayer Garden brands.

Date: Monday June 22, 2015, 13-17h

Please arrive promptly at 13h to Plateau St Pierre (room C320)

Preparation: Please bring a picture of your own garden/balcony and of your ideal garden/balcony. Please bring the hard copy of the pictures as we will present them to the group.



The image is a collage. The top left shows a large group of a family (men, women, and children) posing together in a living room with a Christmas tree in the background. The bottom section contains three smaller images: a close-up of a gold star-shaped Christmas ornament, a row of lit white candles, and a close-up of a Christmas tree branch with red berries and a white and red striped ornament.

You are kindly invited to a workshop on
Xmas luxury gifting
on December 7th, 2012 from 11.30 am – 4pm
@ XXXX

The objective of the session is to better understand the world of luxury gifting at Xmas to help us develop a questionnaire for our research to elevate the role of fine fragrances as a gift.

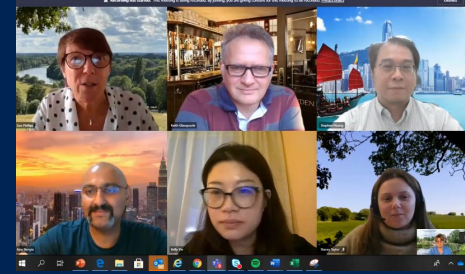
In order to prepare for this workshop we would like to ask you to prepare by

1. Reading the attached deck
2. Writing down the Xmas gift lists of 2 people (someone close and someone distant to you).

Season's greetings and look forward seeing you soon.

6. Preparing the participants – contribution ready

1. Make it interesting and fun
2. Make it accessible/ easy to do
3. Keep it brief
4. Reinforce its value to the success of the workshop
5. Use it!!



Execute



What are the
characteristics of a very
good facilitator?

It's not necessarily what you think....

What makes a great workshop facilitator?

1

They keep
learning

2

They believe
in the
collective

3

They enjoy
influence rather
than status

4

They like
empowering
people

Characteristics of a very good facilitator

1

**Understands
the business
objectives**

2

In Control

3

**Charismatic
and Inspiring**

4

**Delivers the
Objectives**



**KEEP
CALM
AND
BE THE
BOSS**

From the beginning ...

- Welcome everyone individually
- Introduce yourself as the leader
- Organise the room
- Make a clear start
- Thank and recognise your key stakeholder
- Set the rules
- Stick to the rules

Facilitation – the basics

YOU

THEM

ENVIRONMENT

- Change pace and direction, ensure room set up encourages 'energy'
- Keep brains fresh with visual, special and sensorial stimulus
- Mix up the tasks and size of groups so they don't know what to expect
- Change the plan if its not working

dominant

- Point out unacceptable behaviour EARLY



Danielle Crouch

Maree Fouche

Max Weldon

Maclean, Janine

What is different Virtually?

Rollo McIntyre

Zibusiso Ngulube

Kgopotso Mokgope

Sue Phillips

Graeme Cook

Elrica Grobler

Govender, Neil

Natalie Campbell

Then the world changed

Change

What is completely different

1. Virtual Workshops work best if they are **spread over** of a number **shorter sessions**
2. Conversations with **big (16+) groups** are **more difficult to manage**
3. We need to design for '**Digital First**' not just adapt an 'in-person' plan



What needs adapting?

1. You will need to allow **more time for preparation** (and output)
2. **Managing breakout groups** and **keeping track** of their **activity** needs a **more formal** approach
3. Lengthy presentations / briefings should be avoided – **pre-work becomes essential** and **engagement techniques** should be built in



What doesn't change

1. To be successful you need to have a clear, **agreed goal / outcome**
2. You need to have the **right people participating** – people who want to be part of the session and will engage fully
3. Running a successful workshop needs **a TEAM of people**
4. Great facilitation **focusses** on the **participants** and the **outcome**



If you only have time to read one slide about running virtual workshops, this is it!

1

OVER PREPARE

VW require more planning than in-person workshops.
For 1 day running a VW you need 3 days preparation.

2

BREAK IT DOWN

Plan multiple shorter sessions. rather than one long one. 2-4 hours session work best.
Timebox everything.
Don't do too many exercises.

3

KNOW THE TOOLS

Become the expert in how the tools work. Use your own tools.
Make sure everyone has access.
Have a technical back room buddy to help troubleshoot.
Have a Plan B and C.

4

MAXIMIZE TOGETHER TIME

Limit Live Time: use short, structured burst of productive time.
Assign pre- and post-work.
Prepare the clients for a contribution mindset.

5

EVEN OUT INTERACTION

Make sure everyone can participate equally.
Invite even number (8-16 delegates) for equal break out sessions.
4 delegates max per break out.

6

OVER COMMUNICATE

Clear instructions for every exercise (step 1-2-3) / clear timings/ example outcomes.

7

GET PERSONAL

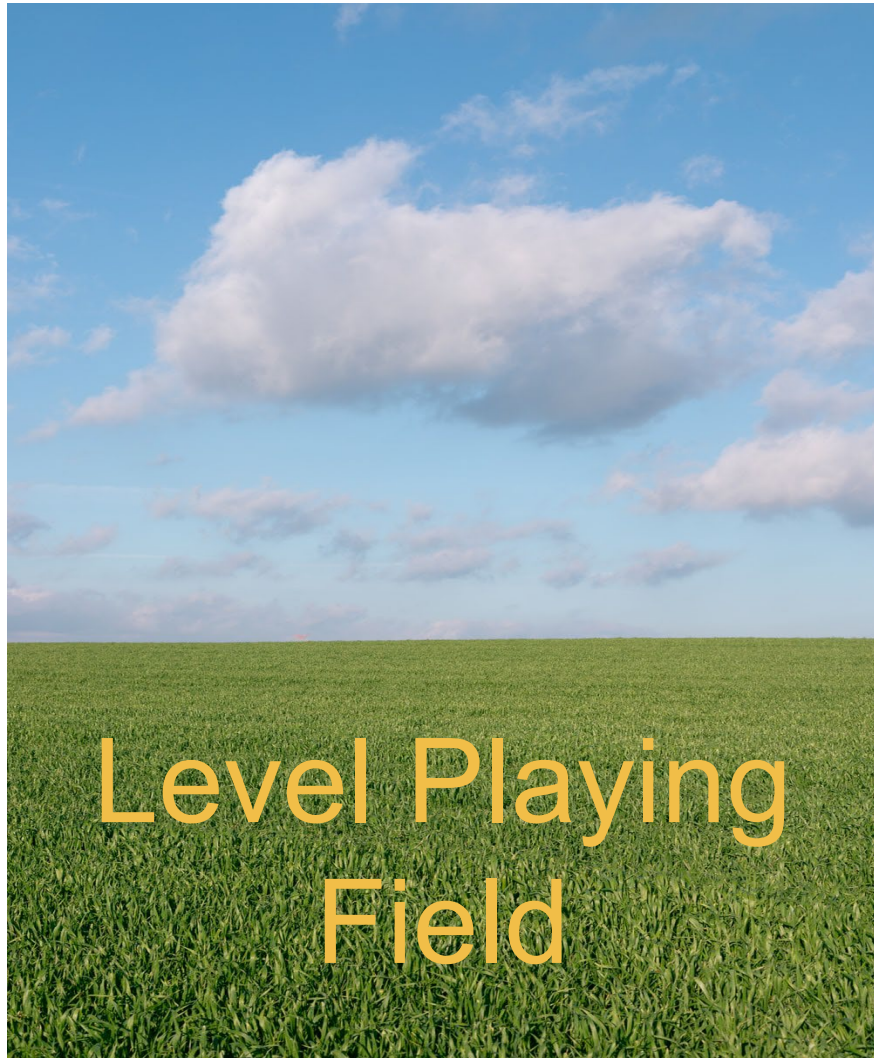
Take time to know each other to build rapport.
Show images, ask for personal prep tasks, empathize with their remote conditions and possible different time zones.

8

THINK DIGITAL-FIRST

Plan for a digital outcome from the beginning.
Adjust exercises to be remote-friendly.

A Word on Hybrid





Avoid if possible!

However Some guidance to optimise

- Remote participants must feel as engaged as in person participants
- Have a facilitator who is focussed on the 'virtual' experience
- Use cameras/ make virtual team present on screen if possible
- Virtual breakout rooms should be mentored
- Questions addressed consistently to virtual and face to face audience

Virtual vs face to face workshops: pro's & cons

	Virtual	Face to face
Pros 	<ul style="list-style-type: none">• Quicker• Output ready and shared quickly• Cheaper• More environmentally friendly• Experts / senior people join more easily• Overall more 'efficient' use of time	<ul style="list-style-type: none">• Enhances relationship building• More of an Experience or Event - memorability• Can digest large amounts of information in a physical setting• Can create a multi-sensorial experience
Cons 	<ul style="list-style-type: none">• Increased preparation time• More difficult to flex and adapt• More challenging to assess engagement• Technology• Need tech support	<ul style="list-style-type: none">• Hi pressure on 'the day'• Diary alignment challenge• Travel time and cost plus venue cost• Output physical/written - needs to be synthesised and digitised

Closing thought

1

This training has introduced you to the core principles of workshop facilitation

2

Everyone has their own personal style and you might find you prefer some tools and techniques over others

3

Feel free to improve, change, evolve and add to them – once you understand the basics you can add to them and do what you want

4

With experience, you will find facilitation more and more enjoyable and rewarding - be it a formal workshop or just making meetings more collaborative and fun!



ENERGISE



LEAD



FLEX AND
ADAPT

6 JOBS TO JUGGLE



LOGISTICS



BUILD
TRUST



SUBJECTIVE
ROLE

Let's Practice

What is the most challenging
for you?

Work in pairs

Why is this a challenge?
How can we address this
challenge?



What do you find most challenging?

Person A : The skill I find most challenging is	Person B : The skill I find most challenging is
Why is this a challenge for you? 	Why is this a challenge for you?
I can overcome the challenge by 	I can overcome the challenge by

THANK YOU.